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ABSTRACT

This course curriculum is intended for use in an advanced information processing course. It builds on the skills developed in the previous information processing course but goes one step further by requiring students to perform in a simulated office environment and improve their decision-making skills. This volume contains two parts of the curriculum--the student materials. The student course syllabus provides this information: credit hours, catalog description, prerequisites, required texts, instructional process, objectives, student evaluation, and class schedule. The student laboratory guide is divided into 10 units: updating company files, jobs using dBase 3 and Lotus 1-2-3, medical, medical forms, legal, miscellaneous documents, learning new software, dictation, printing out database management and spreadsheet files, and office automation project. Materials provided for each unit include an introduction and jobs (learning activities). (YLB)

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Curriculum Improvement Project

Region II

ADVANCED INFORMATION PROCESSING

Volume I: Student's Materials

Developed by Linda Stanford

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
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Prepared by:

Galveston College

With Support From:
Coordinating Board
Texas College and University System
Division of Community Colleges
and Technical Institutes
PVEP 87-1030-B-2
Project Director: Cheryl L. Willis, Ph.D.

June 30, 1987

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FOREWORD

Galveston College is not unlike other small community colleges trying to keep its curriculum in sight of rapidly changing technologies. We are unique, however, in that we were given an opportunity by the Coordinating Board of the State of Texas through a grant of Carl D. Perkins Act vocational funds to undertake a major curriculum improvement project which had as its focus curricula for accounting, the allied health professions, microcomputer applications, and office occupations. The course curriculum that you have before you is one of nine courses or modules that were developed from this project. What cannot be immediately evident to you, though, is the sense of cooperation that governed the various phases of the project. The resulting benefits to the College, its faculty, and its staff as a result of this project, were many, including increased knowledge of the curriculum improvement process, increased knowledge of the ramifications of networking microcomputers, increased awareness of the vocational programs of other community colleges, and increased awareness of the need for staff development opportunities. The enduring impact of this project will come in the months ahead as our instructors, and hopefully other instructors across Region II and the state, implement the curricula. We at Galveston College are proud of the results of the Curriculum Improvement Project and hope that your college will share the benefits.

Dr. Marc A. Nigliazzo
Vice President and Dean of Instruction
June 30, 1987

REGION II

CURRICULUM IMPROVEMENT PROJECT

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Copies of the above course curriculum are available for a nominal cost from: Division of Business and Technology
Galveston College
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Galveston, TX 77550

A C K N O W L E D G M E N T S

This course curriculum represents but one of the many final products of the Curriculum Improvement Project. I want to take this opportunity to thank those individuals who worked so hard together to bring this project to a successful conclusion. To the administration and the Board of Regents of Galveston College I wish to express my appreciation for their willingness to accept the challenges and risks associated with a project of this magnitude and for having the forethought to see its benefits for the college and the community. To the support staff in the Business Office and the Office of Planning and Development, thank you for your patience and helpfulness in providing the project staff with everything we needed--yesterday. To Karla Back, Assistant Dean of the Division of Business and Technology, for her constant encouragement of the vision of the project, I will be forever grateful. My most heartfelt thanks, though, go to the project team--all of the curriculum writers who gave 110 percent effort whenever it was needed; the various editors and word processors who helped us along the way; Paul Fama, Research Associate, who provided constancy and consistency; and Mary James, project secretary, who kept us all sane.

Galveston, Texas
June 30, 1987

Cheryl L. Willis, Ph.D.
Project Director

P R E F A C E

Advanced Information Processing builds on the skills developed in the previous information processing course, but goes one step further by requiring the student to perform in a simulated office environment, thus improving her decision-making skills. The following course curriculum should be used as a resource by fellow instructors and administrators when making decisions about implementing a similar course at their institutions. This course curriculum contains four parts in two volumes--the student's course syllabus and student's laboratory guides for each unit (Volume I) and the instructor's course syllabus and instructor's guides for each unit of the course (Volume II). The materials presented in this course curriculum are only a suggested format for a course of this nature and, as typical with community college curriculum, will undergo revision in the future. The author and Galveston College welcome your comments regarding your experience with these materials.

VOLUME I

STUDENT'S MATERIALS

STUDENT COURSE SYLLABUS

OFT 2402: Advanced Information Processing

STUDENT'S COURSE SYLLABUS

Course Title: Advanced Information Processing

Course Number:

OFT	2402	3	2	4
Prefix	No.	Lecture Hrs.	Lab Hrs.	Credit Hrs.

Catalog Description:

Capstone course in which students apply their information processing skills in a simulated office environment.

Prerequisite:

OFT 2401- Intermediate Information Processing

Information processing applications in a networked environment. Students will learn to use advanced word processing applications in addition to learning practical applications of a spreadsheet, data base, and graphics, electronic mail and files.

Texts:

Advanced Information Processing Student's Laboratory Guides

Word/ Information Processing: Exercises, Applications, and Procedures by L. Joyce Arntson and Lora Brunello Todesco.

How to Dictate by Adele F. Schrag, McGraw-Hill Book Company, 1981.

Instructional Process:

1. Self-paced teaching methods--one-on-one instruction.
2. Class and laboratory assignments.
3. Tests.
4. Office Automation research project and a written report.

Course Objectives:

The student should be able to:

1. Create, edit, append, and print files using a database management software package.
2. Create, edit, and print spreadsheets and graphs using a spreadsheet software package.
3. Create, edit and print a calendar using s desktop management software package.
4. Use the word processor and calculator functions of a desktop management software in order to produce documents.
5. Produce boilermaker documents using a word processor software package.
6. Produce mailable documents from handwritten documents and from dictation tapes in executive, medical and legal fields using a word processing software package.
7. Research information about office automation and to make decisions regarding equipment, softwqre, furniture, etc.
8. Compose paragraphs describing evaluation processes and the final decision of that evalua tion when wo5rking on the Office Automation Project.
9. Merge all the paragraphs together into one report which contains both paragraphs graphs made on a spreadsheet software package.
10. Dictate an organized letter after working through a dictation unit.
11. Train a fellow classmate by creating an instruction sheet, by demonstrating the task, equipment, or software to be learned, and by assigning a short job for the trainee to do to demonstrate mastery of the task.
12. Demonstrate decision making skills by working with a group to solve two problem situations.
13. Demonstrate a professional attitude toward the assignments in the class and toward fellow classmates and the instructor.
14. Demonstrate the ability to manage time in order to complete the assignments of the course in the amount of time given.
15. To compose a letter and print it out in mailable form.

Evaluation of Students:

Class and Laboratory Assignments will make up 40% of the final grade. These assignments are to be done by the student in the laboratory. These jobs are to be graded for mailability. If the job is mailable upon first submission, a grade of 100 will be assigned to that job. If the job is not mailable on the first submission, the student will make the necessary corrections and resubmit. If the job is correct on the second submission, a grade of 89 will be assigned to that job. If the job is not mailable on the second submission, the student will make the necessary corrections and resubmit. If the job is correct on the third submission, a grade of 79 will be assigned to that job. If the job is not mailable on the third submission, a grade of 50 will be assigned to that job.

The Automation Project will make up 30% of the final grade. This project will enable the student to totally automate a company. The student will make decisions concerning software, computer equipment, network system, furniture and accessories, dictation equipment, teleconferencing, OCR equipment, telephone system, copy equipment, etc. The student will use Lotus 1-2-3 to make spreadsheet which compares different brands of equipment and which creates a graph to be used in the final report. The student will compose a report describing all equipment and accessory choices made for the company. This project will be graded for completeness of equipment choices and their justification, for correctness of word choices, grammar, and punctuation, and for transition from one paragraph to another.

Tests make up 20% of the final grade and will be giving at the end of the first six units. The jobs on the tests will be similar to the jobs in that unit.

Technique makes up 10% of the final grade. The technique grade will evaluate the student's ability to work alone asking questions only when necessary, the ability to make decisions after reading and comparing information, the ability to use the software with minimum amount of help from the instructor, the ability to use time wisely, the ability to bring all necessary supplies and books to class, and the ability to maintain a positive attitude toward the course and the instructor.

Final Grade Determination:

Class and Laboratory Assignments	40%
Automation Project	30%
Tests	20%
Technique	10%
Total	100%

Suggested Class Schedule:

Unit	Hours to Complette
1	8
2	8
3	8
4	4
5	4
6	10
7	7
8	2
9	2
10	23
11	2
12	2

STUDENT LAB GUIDE

UNIT 1

UPDATING COMPANY FILES

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 1--Updating Company Files

SECRETARIES INCORPORATED--Introduction

Welcome to Secretaries Incorporated. We are a free-lance secretarial firm that does any kind of secretarial job from medical to legal. The firm also creates and maintains files using dBase 3 and Lotus 1-2-3. We have regular clients who use our services weekly and other clients who use our services once or twice a month. However, we are always ready to help anyone who walks in needing some kind of secretarial help. Therefore, we do have the names of clients who have used our services only once or twice. In addition to jobs that we do in the office, we are a temporary service for companies needing temporary secretaries at their place of business.

Since the firm handles different types of secretarial work, the following are the charges for different jobs:

Creating Files on dBase 3	$ 9/hr.
Revising or Adding records to dBase 3	$ 7/hr.
Creating a spreadsheet on Lotus	$10/hr.
Revising a spreadsheet on Lotus	$ 7/hr.
Creating documents on DisplayWrite 4	$10/hr.
Dictation using DisplayWrite 4	$12/hr.
Consultation Fee	$20/hr.

As a new employee at Secretaries Incorporated, you will be doing a variety of jobs as they come into the office. You will be trained and supervised by the office manager, Susan Drake. Ms. Drake has hired you because you know Lotus 1-2-3, dBase 3, DisplayWrite 4, and Sidekick. You will responsible for the following:

1. Maintaining the client and employee files on dBase 3. Each time a new client or employee is added to the dBase 3 file, you will need to print out a new list for Ms. Drake.

2. Maintaining the spreadsheets for the billing each month. This billing process will mean that you will have to enter the charges for each client into the billing spreadsheet for that firm as jobs are completed, so bills may be sent out at the end of each month.

3. Maintaining Ms. Drake's and Mr. Jones's calendars on Sidekick.

Since the above responsibilities have been outlined to you on your first day at work, Ms. Drake will not tell you to do these maintenance features of your job. You will be expected to maintain and print out lists as described above without specific requests to do so.

Job 1--Disk Preparation

Before you can begin work, you must prepare your disks for the software you will be using. Each employee keeps track of the disks he or she is using. Also, Susan has found three disks, and she is not sure what is on them. You will need to look at the contents of the disks and make decisions about the documents that are on them.

1. Format and label your disks. You will need a disk for your data base files, your spreadsheet files, and your DW4 files.

2. Look at the disks you have received from Susan (Your Instructor). Copy these disks onto some work disks using DOS commands. The first thing you will need to do is to look at the contents of each disk using DW4. After looking at the document, decide upon an appropiate name for the document using the extension to group documents. Rename the document using DW4. Do not print out the documents. If you find any files duplicated on the disks, be sure to give them the same name. Print out a directory of each disk after you have renamed the documents. This can be done by using DOS. Turn these in to your instructor for checking before going on.

3. You will need to group the documents on two disks. You may decide how they should be grouped. Use DOS to delete and copy documents from one disk to another. Type out a label for each of the used disks. Print out the directory of each disk and label it according to the disk with which it goes. When you have finished, you should have two labeled disks with corresponding directories taped to the front of the sleeve and one blank, unlabeled, formatted disk.

Job 2--Employee File

Susan has given you a revised list of all the employees in the office. Since you know dBase 3, she would like for you to put the list of employees on the data base so that she may use this list in different ways. You will be using the data base to generate many lists used by the company.

The revised list of employees is as follows:

EMPLOYEE LIST

Name	Date of Employment	SS#	Ext.	Dept.
Susan D. Drake Office Manager 234 Smith Waco, TX 797~~58~~ 10	3-8-83	483-87-8976	364	Management
Donna C. Smith Word Processing Specialist I 2356 ~~D~~own Street Waco, TX 76710	2-~~2~~0-86	456-98-9764	321	WP
Jim J. Jones Accountant ~~1245~~ Fish Pond Waco, TX 76710	3-24-85	235-32-8765	342	Accounting
Linda S. Freeman Word Processing Specialist II 1234 Crest Street Waco, TX 76710	3-14-85	239-98-~~6754~~ 7354	341	WP
John T. Timbers Jr. Accountant 435 Meyers Lane Waco, TX 76708	2-~~14~~ 17-86	234-98-6879	340	Accounting
Katy S. Walker WP Trainee 7525 Linda Jones ~~2356 Crestwood~~ Waco, TX 76~~7~~10	1-14-87	549-98-3487	~~234~~ 200	WP
Kathryn K. Spikes Word Processing Specialist II 4508 Lake Air Waco, TX 76710	2-2-84	098-38-~~8985~~ 7543	346	WP
Jamie C. Smith Word Processing 8764 Specialist I ~~9876~~ Embers Waco, TX 76706	3-20-85	786-04~~1~~ 9-8745	~~324~~ 330	WP
Lance J. Scott Public Relations ~~9867 Bethany~~ 9476 Beth Waco, TX 76707	1-23-85	789-23-6784	~~23~~ 219	PR

Janet K. Darem
Receptionist
876 Strong Street
Waco, TX 76710 3-2-87 987-23-5403 235 WP

Anna S. Anderson
Temporary Secretary
253 Belview Drive
Waco, TX 76710 10-25-86 234-64-2893 235 Sec

Robert D. Sampleton
Temporary Secretary
345 Times Street
Waco, TX 76707 12-3-86 345-68-2037 ~~236~~ 324 Sec

Joyce F. Simpson
Clerk and Duplicating
4857 Brenda Street
Waco, TX 76703 11-4-86 283-63-0974 237 WP

Melba C. Johnson
Temporary Secretary
2309 Patricia
Waco, TX ~~76710~~ 76709 9-23-85 098-34-~~7865~~ 5467 238 Sec

Instructions for setting up data base: Set up a field for last name, first name, middle initials, title, street address, city, state, zip, date of employment, Social Security #, extension, department, network access. The abbreviations used on the previous pages are explained as follows:

WP - Word Processing
Sec - Secretary
PR - Public Relations

In the client file, you will use the full names.

You will need to determine the size of each field. Then set up the file. The network can only be accessed by the WP, Management, and Accounting Departments. Indicate this access by a "Yes" or "No."

As you print each part listed below, print yourself a copy. On that copy, write down the name of the file you sorted to and the name of the report form you set up to print out the list. You will be wise to start a notebook with the lists and the names of the files and the report forms because you will be reprinting these forms each time there is a change in information or an added record. You will not be told to print these forms but you will need do so with any change.

You may name your files whatever you like. Make sure the name reminds you of the contents and purpose of the file.

Instructions for printing:

1. Print the entire file using list to print. Turn this list in to your instructor for checking before going on.

2. Print an extension list, sorted alphabetically by name, showing full names, departments and extension numbers. When you set up your report form, use a column heading for items requested above.

3. Print an extension list, sorted alphabetically by department and name, showing full names, departments and extension numbers.

4. Print a list of employees showing the descending order of the employment field. The list should include the full names, departments and date of employment sorted in descending order according to the date of employment field. You will need to modify the file by adding a "date" field. In this field you will put the dates of employment beginning with the year, month, and date. (87-02-23). You will use the field to sort with, but you will print out the employment field.

5. Print a list of employees showing the ascending order of employment. The list should include the full names, departments and date of employment sorted in ascending order according to the date of employment field.

6. Print a list of employees, sorting alphabetically by full name, showing the Social Security No. of the employees. The list should include the last name, first name, department, and SS# sorted according to last name, first name.

7. Print a list of employees showing the home addresses. The list should include last name, first name, address, city, state and zip sorted according to last name and first name.

8. Print a list of employees showing the phone numbers for the employees. The list should include the last name, first name, and phone number sorted according to last name and first name.

9. Print a list of the employees having access to the network. The list should include last name, first name, department, network access, department, and extension sorted according to network, last name and first name.

10. Print a list of employees showing last name, first name, address, city, state, zip code, and telephone number sorting according to full name. This report form will take special planning because you are trying to get so much information on one page.

Job 3--Client File

Instructions for setting up the data base: You have been asked to set up a client data base file (see next page). Set up a field for the following: last name, first name, company, address, city, state, zip code, account #, telephone, work type, and customer. You will need to determine the size of each field to accommodate the longest line of each field. When keyboarding the name of the company owner, be sure to key the last name, first name, and middle initial, respectively.
(Smith, John F.)

The following is a current list of the clients we are presently serving:

CLIENT LIST

Name	Acct #	Phone #	Type of Work	Type of Customer
John David John's Print Shop 4598 Main Street Waco, TX 76708	8765	757-8963	~~Retyping~~ Draft typing	Weekly
Ed Prinston Prinston Mfg. 5320 Loop 340 Waco, TX 76708	8964	765-3409	Letters	Weekly
Cassidy James Attorney 2350 Winsor Waco, TX 76710	6897	757-0954	Legal Doc.	Weekly
James T. Smith, M.D. Smith Medical Center 12234 Sun Valley Waco, TX 76710	6785	757-2389	Medical Doc.	~~Weekly~~ Monthly
Harold James Baylor Student 2345 Baylor Avenue Waco, Tx 76703	8754	755-3948	Term Papers	As Needed
Tim Hathaway Hathaway Plumbing 3459 S. Valley Mills Waco, TX 76706	8765	756-2398	Billings	Monthly
Marcy Williams Williams Interior Design 2389 Spring Street Waco, TX 76710	8768	765-3904	Mass Mailings	Monthly
John P. Turner Turner Travel Agency 2349 Fort Street Waco, TX 76710	9876	765-3409	Mass Mailings	Weekly
Thomas Johnson, M.D. 3405 Pine Street Waco, TX 76710	6754	756-3409	Medical Doc.	~~Monthly~~ Weekly
Jennifer Henry Henry's Interiors 234 ~~Springdale~~ Fernwood Waco, TX 76709	6735	756-3298	Correspondence	Monthly

Name	Acct #	Phone #	Type of Work	Type of Customer
James T. Baker Attorney 2349 Danville Waco, TX 76710	8753	756-3290	Dictation	Weekly
St. James Hospital → Jerry Stafford, administrator 8954 Westview Drive Waco, Tx 76710	7654	765-2036	Dictation	Weekly
Don Stubing Contractor 2309 Westmerry Waco, TX 76708	8907	756-1209	Contacts	Weekly
James West West Maintenance 490 Fort Street Waco, TX 76709	3472	756-9063	Mailings	Monthly
Jane Price, D.D.S. 658 Austin Avenue Waco, TX 76703	3849	752-0945	Mailings	Monthly
Tom Attaway Attaway Marketing Inc. 9876 Bosque Waco, TX ~~98355~~ 76710	9876	756-3409	Correspondence	Monthly
Jamie Panque Student 3940 Jamea 76708 Waco, TX ~~76730~~	8643	765-3043	Term Papers	As Needed
Cory Downing Downing, Inc. 3094 Patricia Waco, TX ~~90656~~ 76703	9843	756-2341	Budget	Monthly
Ted Crammer Crammer Employment Agency. 3490 Fremont Waco, Tx 76710	7856	756-2098	Client List	Monthly
Tye Dumas Dumas Independent Agency 2129 Spirit Bredmont, TX 76895	0965	884-2094	Client List	Monthly
Jeff Evans Attorney 8905 Main Clifton, TX 76894	3748	881-7943	Dictation	As Needed

Name	Acct #	Phone #	Type of Work	Type of Customer
Sam Swanson Waco Sport Club 4903 Sanger Waco, TX 76710	7643	756-3209	Billings	Monthly
Tammy Spenco Spenco Photography 4965 Bosque Waco, TX 76703	7645	756-3925	Mass Mailings	Weekly
Stewart Ballinger Ballinger Marketing Service 5973 Broughton Waco, TX 76710	0954	757-3493	Temporary	As needed
Dan Stimpson Pumps, Inc. 5894 James Street Clifton, TX 78763	3895	753-2050	Temporary	As needed
Jim Wylie Wylie Real Estate 5940 West avenue Waco, TX 76710	0987	757-3409	Mass Mailings	As needed

Instructions for printing:

1. Print a listing of the entire file using list to print. Turn this printout in to your instructor to be checked before going on.

2. Print a list of client names and addresses, sorting on company name, showing the company name, address, city, state, and zip code. Create a report form to show the titles given.

3. Print a list of client names and telephone numbers, sorting the company name alphabetically, showing company name, company owner, acct. no., and telephone number.

4. Print a list of company owners and telephone numbers, sorting the company owners alphabetically, showing company name, company owner, acct. no., and telephone number.

5. Add the following record to the client file:

   Joshua's Real Estate
   Joshua Arron
   2406 Swinson
   Waco, TX 78708
   6324
   752-8372
   Mailings
   Monthly

   Edit the following files:

   John Cassidy--change phone to 757-3674
   Spenco Photography--change address to 4236 Santa Fe, Waco, TX 76707

   Revise the files for the forms you printed in Nos. 2-4. You will need to re-sort your "use" files but not your report form files.

   Print the forms again since revisions have been made to the client file.

6. Print a list for the kind of work done for each client showing company name, company owner, kind of work, and kind of customer.

7. Print a list of account numbers, sorted ascending, showing company name, company owner, and acct. no.

8. Print a list of account numbers, sorted descending, showing company name, company owner, and acct. no.

Job 4--Using Sidekick to set up a Calendar and Phone Directory

1. You are in charge of Susan Drake's and Jim Jones' calendar. Susan and Jim have handed you their schedules for the next few days beginning with tomorrow (use the date for tomorrow). Their appointments are as follows:

Susan

Tomorrow
10 - Mrs. Dickson - meeting
12 - Lunch with Rev. Jones
4 - Staff meeting
6 - Cub Scouts

Next Day
9 - meeting with Jim Jones
10 - meeting with Lance Scott
12 Lunch with Don
4 meeting with WP people

Next Day
8-12 Work on Budget
12 - Lunch with Marla
2 meeting - Don Stuhring

Jim

Tomorrow
9- Work on Budget
12- Lunch with John S.
4 meeting with John S.

Next Day
9- meeting with Susan
12 Lunch with Smitty
6 Golf with John

Next Day

8-12 Work on Budget with Susan

Using Sidekick enter the above information into the calendar and then print out the calendars.

2. Using the notepad function, create a dialing file for the dialer for the clients on your original list who are weekly customers. When entering these numbers into the file, put the owner's name first, space three times, enter the phone number, space three times, and enter the name of the company or the occupation of the client. Save this file and print.

Job 5--Creating Bills Using Lotus 1-2-3

Susan has asked you to put the billings on a spreadsheet format so that the bills can be kept up to date as jobs are done. She handed you the following draft of what items you should include on the spread- sheet:

SECRETARIES INCORPORATED
3501 MAIN STREET
WACO, TX 76703

Name:
Address:
City:
Account No.

DATE	DESCRIPTION	TYPE OF SOFTWARE	NUMBER OF HOURS	CHARGES PER HOUR	CHARGES	PAYMENTS	BALANCE

The columns cannot be too wide. The whole spreadsheet should be printed on a full sheet of paper.

Since each person in Secretaries Incorporated keeps a log of his/her time for each job completed, you will need a column for the hours or fractions of hours spent on the job. That amount is then multiplied by the charges per hour as listed in the "Introduction." The "Charges" column will show the amount after multiplication. The "Payments" column reflects any payments made during the month. The "Balance" column will show the amount due.

Instructions for the spreadsheet:

1. Create the spreadsheet

2. Put in the formulas

3. Change the spreadsheet to show the formulas. Print a copy and turn in to your instructor for checking purposes.

4. Name the spreadsheet something appropriate. This spreadsheet will be used as a shell to retrieve and enter the client's information and save to the client's name. Therefore, you will have a shell spreadsheet and a spread-sheet for each client.

Job 6--Creating Spreadsheets for the Clients

Using the shell you have just created, create a spreadsheet for the following clients and enter the amounts when shown:

St. James Hospital -- 0 balance
Ballinger Marketing Service -- 0 balance
Prinston Mfg.-- 0 balance
Turner Travel Agency -- 0 balance

Smith Medi Center -- May 29, 1987
Des. - Data Base
Software - dBase
Hours - 2.75
Payments - 0

John's Print Shop - May 12, 1987 May 18, 1987 May 30, 1987
Des. - Newsletter Report Payment - $25
Software - DW4 DW4
Hours - 3 2.5

James T. Baker - May 24, 1987
Des. - Letter
Software - DW4
Hours - .75
Payments - 0

Crammer Employment Agency - May 14, 1987
Des. - Budget
Software - Lotus
Hours - 1.75
Payments - 0

Wylie Real Estate - May 13, 1987
Des. - Letters
Software - DW4
Hours - 2.75
Payments - 0

This billing is the billing for the last of May. Print these statements and turn in to your instructor.

Job 7 -- Creating a Time Sheet

Susan has asked you to create a Time Sheet that the employees may use to record their time while working on a job. It should

have Secretaries Incorporated and the name of the sheet at the very top. Then it should have a place for the employee to write in her name.

It should include the following column titles:

Date	Customer Name	Software	Type of Document	Time IN	Time Out	Total Hours

Creating Instructions:

1. Use column layout to set up the columns.
2. Use double lines before and after the column titles.
3. Use the "Copy" key as much as possible.
4. Create a note at the bottom of the page to convert 15 minutes of an hour into 1/4 of an hour--15 = .25, 30 = .5, 45 = .75. Place an asterisk beside the columns to which the note apply.

Printing Instructions:

1. Print two or three copies of the document.
2. Draw lines between the column headings with a black pen. Make sure the lines are straight.
3. You will use this sheet when you are creating jobs.

UNIT 2

USING dBASE 3 AND LOTUS 123

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 2 - Jobs Using dBase3 and Lotus 1-2-3

Job 1--Creating and Printing A Data Base for a Private School

The Learning Center is a new account. They want us to set up a data base of their student body. Since you know dBase3 and have now set up all the files for the office on dBase3, you are the logical one to take this job. The Learning Center is located at 4102 Columbus Avenue, Waco, TX 76703. The phone number is 757-3497. They will be using our services weekly for data base and spreadsheet. Donald Jones is the principal of the school.

Be sure to keep track of the amount of time (on your timesheet) it takes you to complete this job. This is a paying customer. After you have the total time, remember to set up a spreadsheet for the customer showing the charges and print. This customer will also need to be added to the client data base. Reprint all necessary forms.

The following is a list of the present student body and staff. Set up a data base with the fields as listed. Remember to keyboard the names in with last name first for alphabetizing purposes.

Job 1--Creating and Printing a Data Base for Private School

CLASSES

NAME	CLASS	AGE	TEACHER	COTEACHER	PARENTS
Davis, Kelli	Kindergarden	4	Janet Smith	Linda Thompson	Sandra and Glenn
Engelbrecht, Bradley	Kindergarden	5	" "	" "	Sally
Jenkins, Todd	Kindergarden	5	" "	" "	Lynell and Stacy
Latham, James	Kindergarden	4	" "	" "	Nancy and Charles
Symank, Jarrod	Kindergarden	4	" "	" "	Deborah and James
Davis, April	1st & 2nd	6	Nancy Latham	Kathy Husak	Sandra and Glen
Fuston, Gary	1st & 2nd	6	Nancy Latham	Kathy Husak	Cynthia
Harness, Jeremy	1st & 2nd	5	Nancy Latham	Kathy Husak	Jane & Tom
Krupicka, Gary	Kindergarden	5	Janet Smith	Linda Thompson	Annie and Alvin
Latham, Charles	1st & 2nd	6	Nancy Latham	Kathy Husak	Nancy and Charles
Ricks, Melinda	Kindergarden	5	Janet Smith	Linda Thompson	Debbie and Marshall
Stanford, Tye	Kindergarden	6	" "	" "	Linda and Don
Brown, Charles	1st & 2nd	7	Nancy Latham	Kathy Husak	Donna and Ronald
Bullington, Scott	3rd& 4th	8	Diane Jones	Jeanie Tipton	Sue and Dwight
Deats, Shelley	1st & 2nd	8	Nancy Latham	Kathy Husak	Jennie and Steve
Ricks, Bradley	3rd & 4th	8	Diane Jones	Jeanie Tipton	Debbie and Marshall
Stanford, Cory	3rd & 4th	9	Diane Jones	Jeanie Tipton	Linda and Don
White, Crystal	1st & 2nd	7	Nancy Latham	Kathy Husak	Dawn
Brown, Melissa	3rd & 4th	9	Diane Jones	Jeanie Tipton	Donna and Ronald
Higginbotham, Jeremy	5th & 6th	11	Alma Zellsko	Sam Johnson	Deborah and James
Jenkins, Melanie	3rd & 4th	9	Diane Jones	Jeanie Tipton	Lynell and Stacy
Deats, Bradley	5th & 6th	11	Alma Zellsko	Sam Johnson	Jennie and Steve
Pinson, Jamie	5th & 6th	12	Alma Zellsko	" "	Christine
Higginbotham, Dawn	High School	13	Bill Jones	Debbie Ricks	Deborah and James
Jones, Chad	Jr. High	13	Evelyn McDonald	Tom Simpson	Diane and Bill
Jenkins, Bryan	High School	14	Bill Jones	Debbie Ricks	Lynell and Stacy
Symank, Ryan	Jr. High	12	Evelyn McDonald	Tom Simpson	Deborah and James
Gascamp, Jennifer	High School	16	Bill Jones	Debbie Ricks	Bobbie and Tommy
Jones, Kari	High School	15	Bill Jones	Debbie Ricks	Diane and Bill
Johnson, Jeff	High School	17	Bill Jones	Debbie Ricks	Kay and Bill
Kelm, Michelle	High School	17	Bill Jones	Debbie Ricks	Laura and Albert
Kaiser, Lorri	High School	15	Bill Jones	Debbie Ricks	Judy and Roger
Penson, Danny	High School	16	Bill Jones	Debbie Ricks	Connie
Obr, Dean	High School	16	Bill Jones	Debbie Ricks	Larry
Symank, Stephanie	High School	16	Bill Jones	Debbie Ricks	Joyce and Charles
Gascamp, Larry	High School	19	Bill Jones	Debbie Ricks	Bobbi
Kaulfus, Carol	High School	17	Bill Jones	Debbie Ricks	Dell and Bill
Kelm, Darrel	High School	18	Bill Jones	Debbie Ricks	Laura and Albert
Haferkamp, Jessica	Nursery	2	Jennifer Thomas	Jessie Wurts	Josephine and Elmo
Carbuhn, Karen	Nursery	2	" "	" "	Shirley
Phillips, Joshua	Nursery	2	" "	" "	Denise

Instructions for Printing

1. Print a "list to print" of the file. Turn this list in to your instructor to make sure it is correct before going on.

2. Create a report form for the file showing name, class, age, teacher, and coteacher. Print a copy.

3. Print out a list of the departments with names alphabetized according to departments sorting to department and name. Print out this list showing the name, class, age, teacher, and coteacher. Mr. Jones would like to pick up these lists this afternoon.

4. Document your time in order to figure the fee for billing purposes. (You will not be reminded in the future.)

Job 2--Budget for Secretaries Incorporated

Susan has just handed you a tentative budget that she and Jim have been working on, and she wants you to set up a budget for the following accounts:

Job 2--Budget for Secretaries Incorporated

Secretaries Incorporated
Budget for 1987

Budget Items	Last Month
Beg. Bal	50234.76
Income:	
Temporary Earnings	33034.34
Free-lance Earnings	24324.96
Total Earnings	?
Beg Balance + Income	?
Expenses:	
Management Salaries	29045.34
Employees Salaries	57098.45
Advertising	503.34
Building Lease	340.23
Offic Supplies	109.34
Offic Equipment	4,423.09
Liability Bond	450.00
Utilities	134.56
Phone Service	57.34
FICA Taxes	4325.34
SS Taxes	1090.45
Education	56.40
Miscellaneous	23.45
Total Expenses	?
Net Loss/Gain	?

Instructions for Setting Up the Spreadsheet:

1. Place our company name at the top of the spreadsheet. The Budget is for 1987 so that should be under the name.

2. The spreadsheet will show only the totals for the last month. However, you will add to it at the end of each month.

3. You will need to set up formulas for the spreadsheet. Since revisions will be made from time to time, be sure to set up your formulas so they will accommodate these changes. Print a copy of formulas used and turn in to your instructor.

4. Print a copy of the spreadsheet and give it to Susan.

Job 3--Revisions to the Private School Data Base

The Principal of The Learning Center returned with the following revisions:

1. Add files:

Jeremy Elmore
Parents - John and Sue
age 13
Birthday - 06-14-64
Class - Jr. High

Sandy Miller
Parents - Joe and Betty
age 3
Birthday - 02-26-84
Class - Kindergarten

Make the following changes in class members: (Remember: Their teachers will change also.)

Name	Class	Class Changed To
James Latham	Nursery	Kindergarten
Melinda Ricks	Kindergarten	1st & 2nd
Tye Stanford	Kindergarten	1st & 2nd
Charles Brown	1st & 2nd	3rd & 4th
Shelley Deats	1st & 2nd	3rd & 4th
Melanie Jenkins	3rd & 4th	5th & 6th
Melissa Brown	3rd & 4th	5th & 6th

Bradley Deats	5th & 6th	Jr. High
Chad Jones	Jr. High	High School

Changes in Staff:

Both teachers in the 1st and 2nd class will not teach this year. They will be replaced by Jenny Adams, teacher, and Johnny Huse, coteacher.

Alma Zelisko will no longer teach 5th & 6th. Her replacement is John Crammer

Linda Thompson will no longer teach Kindergarten. Her replacement is Willie James.

Also make the additional changes in the Private School Data Base which is on the following page:

Additional changes in Private School Data Base

Page No. 1
06/13/87

THE LEARNING CENTER
LIST OF STUDENT BODY
CURRENT DATE

NAME	CLASS	AGE	TEACHER	COTEACHER
Davis, Kelli	Kindergarten	5 ~~4~~	Janet Smith	Linda Thompson
Engelbrecht, Bradley	Kindergarten	5	Janet Smith	Linda Thompson
Jenkins, Todd	Kindergarten	5	Janet Smith	Linda Thompson
Latham, James	Kindergarten	5 ~~4~~	Janet Smith	Linda Thompson
Symank, Jarrod	Kindergarten	5 ~~4~~	Janet Smith	Linda Thompson
Davis, April	1st & 2nd	6	Nancy Latham	Kathy Husak
Fuston, Gary	1st & 2nd	7 ~~6~~	Nancy Latham	Kathy Husak
~~Harness, Jeremy~~	~~1st & 2nd~~	~~5~~	~~Nancy Latham~~	~~Kathy Husak~~
Krupicka, Gary	Kindergarten	6 ~~5~~	Janet Smith	Linda Thompson
Latham, Charles	1st & 2nd	7 ~~6~~	Nancy Latham	Kathy Husak
Ricks, Melinda	Kindergarten	6 ~~5~~	Janet Smith	Linda Thompson
Stanford, Tye	Kindergarten	6	Janet Smith	Linda Thompson
Brown, Charles	1st & 2nd	8 ~~7~~	Nancy Latham	Kathy Husak
Bullington, Scott	3rd& 4th	8	Diane Jones	Jeanie Tipton
Deats, Shelley	1st & 2nd	9 ~~8~~	Nancy Latham	Kathy Husak
Ricks, Bradley	3rd & 4th	8	Diane Jones	Jeanie Tipton
Stanford, Cory	3rd & 4th	10 ~~9~~	Diane Jones	Jeanie Tipton
White, Crystal	1st & 2nd	8 ~~7~~	Nancy Latham	Kathy Husak
Brown, Melissa	3rd & 4th	9	Diane Jones	Jeanie Tipton
Higginbotham, Jeremy	5th & 6th	11	Alma Zelisko	Sam Johnson
Jenkins, Melanie	3rd & 4th	10 ~~9~~	Diane Jones	Jeanie Tipton
Deats, Bradley	5th & 6th	11	Alma Zelisko	Sam Johnson
~~Pinson, Jamie~~	~~5th & 6th~~	~~12~~	~~Alma Zelisko~~	~~Sam Johnson~~
Higginbotham, Dawn	High School	14 ~~13~~	Bill Jones	Debbie Ricks
Jones, Chad	Jr. High	13	Evelyn McDonald	Tom Simpson
Jenkins, Bryan	High School	15 ~~14~~	Bill Jones	Debbie Ricks
Symank, Ryan	Jr. High	13 ~~12~~	Evelyn McDonald	Tom Simpson
Gascamp, Jennifer	High School	16	Bill Jones	Debbie Ricks
Jones, Kari	High School	16 ~~15~~	Bill Jones	Debbie Ricks
Johnson, Jeff	High School	17	Bill Jones	Debbie Ricks
Kelm, Michelle	High School	18 ~~17~~	Bill Jones	Debbie Ricks
Kaiser, Lorri	High School	16 ~~15~~	Bill Jones	Debbie Ricks
Penson, Danny	High School	15	Bill Jones	Debbie Ricks
Obr, Dean	High School	18	Bill Jones	Debbie Ricks
Symank, Stephanie	High School	18	Bill Jones	Debbie Ricks
~~Gascamp, Larry~~	~~High School~~	~~19~~	~~Bill Jones~~	~~Debbie Ricks~~
Kaulfus, Carol	High School	18 ~~17~~	Bill Jones	Debbie Ricks
Kelm, Darrel	High School	18	Bill Jones	Debbie Ricks
Haferkamp, Jessica	Nursery	2	Jennifer Thomas	Susie White
Carbuhn, Aaron	Nursery	3 ~~2~~	Jennifer Thomas	Susie White
Phillips, Joshua	Nursery	2 ~~1~~	Jennifer Thomas	Susie White

2. Revise all files that are affected by these changes.

3. Print out a new list of the Private School File with the same headings as before.

4. Print out a new list of the departments with the same headings as before.

**** TEST 1 OVER DATA BASE--Ask Your Instructor for ****
**** this Test after you have seen your results of ****
**** the Private School Data Base ****

Job 4--Creating an Expense Budget for The Learning Center

Mr. Jones brought the budget for 1986 and the adopted budget for 1987 by for you to build a spreadsheet for future use. He has the following special instructions.

1. The title of the spreadsheet can either be centered or at the left.

2. Put a blank line between the titles and the column heading. Please center the column headings.

3. Leave a blank line between the subtitles and the expenses that fall under that subtitle.

4. Leave a blank line between the total lines and the next subtitle.

5. Indent the word "TOTAL" from the left margin so it will stand out.

6. Leave a blank line before the "TOTAL EXPENSES." Print the spreadsheet

7. Make the spreadsheet look as attractive as possible with commas, dollar signs, etc.

The budget he submitted is as follows:

Job 4--Creating an Expense Budget for The Learning Center

The Learning Center
Budget for 19__

	Last Yr.	19
Budgeted Items:		
Salaries Expense:		
Management Salaries	$ 60,469	65,667
Teach. Salaries	250,750	300,475
Maintenance Salaries	45,075	55,376
FICA Taxes	24,888	29,506
Social Security Taxes	28,444	33,721
Total Salaries Expense	?	?
Professional Development Expense:		
Workshops	50,765	65,076
Conferences	120,825	130,700
Travel	45,700	50,500
Overnight accommodations	135,000	135,500
Miscellaneous	25,000	35,000
Total	?	
Supplies Expense:		
Books	250,700	300,500
Paper for copy machine	5,000	5,500
Office Supplies	3,575	4,575
Total Supplies Expense	?	?

Job 4 Continued

	Last Year	19—
Building Expenses:		
Equipment Maintenance	53,700	60,500
Supplies for Cleaning	2,500	3,750
Supplies for Equipment	10,700	12,550
Total Building Expenses	?	?
Miscellaneous Expenses:		
Insurance	45,000	73,000
Advertising	6,500	7,425
Liability Bond	7,670	7,875
Utilities	125,745	145,890
Phone Service	41,247	42,500
Lease	10,746	15,140
Miscellaneous	1,500	1,800
Total	?	?
Total Expenses	?	?

Job 5--Revisions to the Company's Budget

Susan and Jim have gone over the company's budget one more time after securing your printout of the spreadsheet. Print out the spreadsheet and return to Susan for her approval. If you did not have dollar signs, commas, etc on the original, you will need to add those. Make the spreadsheet look as attractive as possible. They have made the following changes:

SECRETARIES INCORPORATED
BUDGET FOR 1987

BUDGET ITEMS	LAST MONTH
Beginning Balance	~~50234.78~~ 50,226.76
Income:	
Temporary Earnings	33034.34
Free-Lance Earnings	24324.96
TOTAL EARNINGS	57359.30
BALANCE + INCOME	107594.06
Expenses:	
Management Salaries	2504~~5~~.34
Employee Salaries	57098.45
Advertising	~~503~~.34
Building Lease	~~340.23~~ 340.00
Office Supplies	109.34
Office Equipment	4423.09
Liability Bond	~~450.00~~ 250
Utilities	134.56
Phone Service	~~57~~.34
FICA Taxes	4325.34
SS Taxes	1090.45
Education	56.40
~~Miscellaneous~~	~~23.45~~
TOTAL EXPENSES	93657.33
NET LOSS/GAIN	13936.73

Insurance $96.50
Answering Service $125

Job 6--Creating a Spreadsheet for Grades

Mrs. Carol Birdsong, a teacher at Waco High School, 1201 Lake Air, Waco, TX 76710 (telephone - 772-8429), has requested that we build a spreadsheet for her history class. She wants the entire spreadsheet to print out on a full sheet of paper. Therefore, the columns must be small. The Exercise grades (E1-E4) should be averaged and placed in a separate column. The Test grades (T1-T4) should be averaged and placed in a separate column. Then the average for the exercise grades and the average for the test grades should be divided by 2 for the final grade which should be in a separate column. At the bottom of the spreadsheet, she wants an average of each column.

The following are the names of the students and the grades they have earned (enter the names with the last name first):

Name	E1	E2	E3	E4	T1	T2	T3	T4
Susie Smith	87	55	67	90	87	56	87	93
John Thompson	88	56	78	86	87	98	86	77
Frank Bates	77	76	65	87	66	56	86	97
Jim Seal	99	87	76	93	73	82	94	97
Jenny Bates	64	74	42	87	54	75	54	76
Dan Sims	87	94	81	87	89	78	67	49
Ron James	45	83	74	62	81	82	73	88
Bebe Dalton	86	75	96	98	96	85	95	96
Jamie Johnson	98	76	84	85	97	75	84	83
John Henry	97	64	53	42	74	64	73	83
Average								

Instructions for Printing:

1. Print out the spreadsheet after all the grades have been averaged. Make it look attractive.

2. Sort the names in alphabetical order and print. She will pick up the print out tomorrow.

Job 7--Revisions to The Learning Center's Spreadsheet

Make the following changes to the spreadsheet of the Center and print a copy for Mr. Jones. He will pick it up this afternoon.

Job 7--Revisions to The Learning Center's Spreadsheet

THE LEARNING CENTER
ADOPTED BUDGET FOR 1987

BUDGETED ITEMS	LAST YEAR	1987	
SALARIES EXPENSE:			
Management Salaries	$60,469.00	$65,667.00	
Teacher Salaries	$250,750.00	$300,475.00	
Maintenance Salaries	$45,075.00	$55,376.00	
FICA Taxes	$24,888.00	$29,506.00	
Social Security Taxes	$28,444.00	~~$33,721.00~~	33,700
TOTAL	$381,126.00	$451,024.00	
PROFESSIONAL DEVELOPMENT EXPENSES:			
Workshops	$50,765.00	$65,076.00	
Conferences	$120,875.00	$130,700.00	
Travel	$45,700.00	$50,500.00	
Overnight Accommodations	$125,000.00	~~$135,500.00~~	130,000
Miscellaneous	$25,000.00	$35,000.00	
TOTAL	$367,340.00	$416,776.00	
SUPPLIES EXPENSES:			
Books	$250,700.00	$300,500.00	
Paper for Copy Machine	$5,000.00	$5,500.00	
Office Supplies	$3,575.00	$4,575.00	
TOTAL	$259,275.00	$310,575.00	
BUILDING EXPENSES:			
Equipment	150,000	170,736	
Equipment Maintenance	$55,700.00	$60,500.00	
Supplies for Cleaning	$2,500.00	$3,750.00	
Supplies for Equipment	$10,700.00	$12,550.00	
TOTAL	$68,900.00	$76,800.00	
MISCELLANEOUS EXPENSES:			
Insurance	$45,000.00	$75,000.00	
Advertising	$6,500.00	$7,425.00	
~~Liability Bond~~	~~$7,670.00~~	~~$7,825.00~~	
Utilities	$125,745.00	$145,890.00	
Phone Service	$41,247.00	$42,500.00	
Texan	$10,746.00	$15,740.00	
Miscellaneous	$1,500.00	$1,800.00	
TOTAL	$238,408.00	$296,180.00	
TOTAL EXPENSES	$1,315,105.00	$1,551,355.00	

Job 8--Revisions to the Spreadsheet on Grades

One week later, Mrs. Birdsong comes back with grades to add to the spreadsheet. Make the following additions.

Name	E5	E6	T5	T6
Susie Smith	96	76	84	56
John Thompson	87	36	42	87
Frank Babs	86	89	92	93
Jim Seals	87	84	86	94
Jenny Gates	62	85	83	81
Dan Sims	91	92	87	89
Ron Games	56	86	63	77
Bebe Saxton	81	86	94	87
Jamie Johnson	56	76	89	82
John Henry	90	92	86	91
Average				

Print out the spreadsheet. It will be too wide for the page, but you may cut and paste it on a full sheet of paper lengthwise or use a sideways program if you have it.

Job 9--Additions to the Calendar for Susan and Jim

One week from the first calendar dates--Susan and Jim hand you the following slips of paper containing their appointments for the next day.

1. Enter the following appointments in the calendars.

Jim Jones

9- Meeting with John
12 Lunch with Smitty
4- Staff Meeting
6- Cub Scouts

Susan

9- meeting - James Cassidy
10. meeting with Jim Hathaway
11:30- Jane Scott
12- Lunch with Dan
1:30 meeting with John Turner
4. Staff Meeting
6- Cub Scouts

2. Print out the calendar dates for Susan and Jim.

3. While you are entering the appointments in the calendar, a phone call is transferred to you; and it is for Susan. You move to the notepad to enter the message that John Turner called to tell Susan that he cannot keep his appointment. He wants to reschedule for tomorrow at the same time. Print out the message from the notepad for Susan.

4. Make the changes in the calendar and print out both days for Susan.

5. The phone rings again. It is another transfer call. This person wants to know the total cost of about two hours of data base and three hours of word processing. Since you are still in Sidekick, call up the calculator and figure the cost. Do a screen print (shift + PrtSc) of the total amount.

****

Remember to update the company data base files (client and employee files) as well as the spreadsheets for billing of these clients for the time you recorded on your timesheet.

****

**** TEST 2 OVER SPREADSHEETS--Ask your Instructor ****
**** for test after you have seen your results of ****
**** the two Spreadsheets created in this unit. ****

UNIT 3

MEDICAL

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 3 - Medical

Job 1--Shells for Medical Reports

Dr. James Smith's secretary is ill. He has asked us to do some work for the staff at Smith Medi Center. He has sent some information for you to read about medical reports. He would like for you to make a shell for a history and physical report, a consultation report, an operative report, a discharge summary, a short-stay report, a radiology report, and a pathology report. In your shell, you will use correct spacing before and after side headings--check your samples on the following pages to show you this spacing. You will also put in the signature line at the bottom of the shell. Double space and add your initials. Then single space and keyboard "D:" and single space again and keyboard "T:" which will indicate the date of dictation and transcription.

MAKING SHELLS FOR MEDICAL REPORTS

Computers and word processing software now make creating forms and reports a simple task because of the ability to save documents and to retrieve those documents. Word processing software allows you to create a shell for medical reports that contains all of the side headings you could possibly need. When using the shells to create for medical reports, you will need to do the following:

1. Retrieve the shell
2. Place the information after the appropriate headings
3. Delete the side headings and subheadings that are not needed
4. Insert side headings or subheadings as given by the doctor
5. Save the document
6. Print the document.

You will be able to modify and rearrange your shell to fit the format you need for the document. Remember, doctors will use different terms for the side headings and subheading; therefore, you can change these headings as necessary. You will read a description of each report in the book entitled MEDICAL TRANSCRIPTION WITH ADVANCED TERMINOLOGY by Lois R. Tutherly. Then you will look at the samples on the following pages to use in making your shells. Remember to name the shell something that will remind you of the report.

Using Get

After you have created all the shells, you will use GET (F6) to call the shell into your new document. Therefore, you will not need to rekey your shells.

History and Physical Report. Read pages 33-37 and page 62 in MEDICAL TRANSCRIPTION WITH ADVANCED TERMINOLOGY by Lois R. Tutherly to learn about the History and Physical Report and to learn how to format the report. The following is a sample of a History and Physical Report. Use the information above and the sample below to set up a shell for this report. Remember, you may put as many side headings in your shell as you like; but you may not always use all of them in each History and Physical Report you create. Note on the sample that when the report is two or more pages long, you put "Continued . . ." at the bottom of each page followed by a second- or third-page heading on the next page.

Job 1A--Create a shell for History and Physical Report.

HISTORY AND PHYSICAL REPORT

NAME: Smythe, Delores F.

HOSPITAL NO.: 018-23-4893

ADMISSION DATE: 8-28-87

ATTENDING PHYSICIAN: Paul S. Drury, M.D.

CASE HISTORY

CHIEF COMPLAINT: Prolapse and bleeding after each bowel movement for the past 3-4 months.

PRESENT ILLNESS: This 68-year-old white female says she usually has three bowel movements a day in small amounts, and there has been a recent change in the frequency, size and type of bowel movement she has been having. She is also having some pain and irritation in this area. She has had no previous anorectal surgery or rectal infection. She denies any blood in the stool itself.

PAST HISTORY:

ILLNESSES: The patient had polio at age 8 from which she has made a remarkable recovery. Apparently, she was paralyzed in both lower extremities and now has adequate use of these. She has had no other serious illnesses.

ALLERGIES: She denies any allergies to food or medicine.

MEDICATIONS: None.

OPERATIONS: Herniorrhaphy, 25 year ago.

SOCIAL: She does not smoke or drink. She lives with her husband who is an invalid and for whom she cares. She is a retired former municipal court judge.

FAMILY HISTORY: One brother died of cancer of the throat; another has cancer of the kidney.

REVIEW OF SYSTEMS:

SKIN: No rashes or jaundice.

HEENT: Unremarkable.

Continued . . .

Delores F. Smythe
Page 3
History and Physical - 8-28-87

Heart: Quit precordium. Normal sinus rhythm without murmurs, rubs, or gallops. Heart sounds appear normal and to split physiologically. No S-4 is heard.

ABDOMEN: Flat without scars. No organomegaly. Liver, kidneys, and spleen not palpable. Tympanic to percussion. The bowel sounds are normoactive.

PELVIC: Deferred.

RECTAL: On anoscopy, there is an exophytic, soft, easily movable mass encompassing 1/2 the circumference of the rectum directly at the dentate line. Full sigmoidoscopic examination to 25 cm was unremarkable.

EXTREMITIES: Range of motion is within normal limits. No pedal edema. All pulses appear equal and full bilaterally. No evidence of chronic arterial or venous disease.

NEUROLOGICAL: Cranial nerves II-XII appear grossly intact. There are no pathological reflexes demonstrated. Reflexes within normal limits.

IMPRESSION: Rectal tumor.

Paul S. Drury, M.D.

lds/appl.ml
D: 5-3-87
T: 5-4-87

Consultation Reports. Read page 177 in MEDICAL TRANSCRIPTION WITH ADVANCED TERMINOLOGY by Lois R. Tutherly to learn about the Consultation Report and to learn how to format the report. The following is a sample of a Consultation Report. Use the information above and the sample below to set up a shell for this report. Remember, you may put as many side headings in your shell as you like; but you may not always use all of them in each Consultation Report you create. Note on the sample that when the report is two or more pages long, you put "Continued . . ." at the bottom of each page followed by a second- or third-page heading on the next page.

Job 1B--Create a shell for a Consultation Report.

GYNECOLOGICAL CONSULTATION

PATIENT NAME: Mary Smith

ATTENDING PHYSICIAN: Donald Roland, M.D.

ROOM NO.: 2345

DATE: 8-28-87

HOSPITAL NO.: 45-8765-33

REASON FOR CONSULTATION: This is a 35-year-old female who has one baby, and she has had regular menses. Her LMP was two weeks ago. She has about a three-month history of a vague awareness of pain in the right lower quadrant and about a two to three week history of discomfort in the right lower quadrant with bending, pusing, straining, urinating, or having bowel movements. She states that she also has some right upper quadrant pain. She is known to have a Crohn's disease of the terminal ileum and is being treated by Dr. Ron Williams for that. Radiologically, that is improving. She is using no birth control except for vaginal sponge, and she does want permanent sterilization. Both she and her husband have been talking about that lately, and she is interested in having that done. She does not want to have any more children ever.

Of interest is that prior to her pregnancy in the office, her baby is about 20 months old, I thought she had possible endometriosis. She never did come to laparoscopy for that.

PHYSICAL EXAMINATION:

ABDOMEN: Negative.

PELVIC: Reveals a small anteflexed uterus, and I do not feel any adnexal masses. She is somewhat tender in the right lower quadrant, but I cannot tell if this is just tenderness around the cecal area or whether this is coming from a tender ovary. On ultrasound, she does have fluid in the cul-de-sac and two small cysts on her 4 cm right ovary. In other words, that is not that remarkable.

DISCUSSION: I discussed with her that we should possibly do a diagnostic laparoscopy on her to rule out any pelvic problems, especially something like endometriosis to see if they may be contributing to her pain that she has. In additional, should I find something at the time of laparoscopy, I would possibly take it out, such as an enlarged right ovary or a twisted right ovary with a predominant endometrioma in it. Should there be generalized endometriosis of

Continued . . .

Mary Smith
Page 2
Gynecological Consultation - 8-28-87

a significant degree, then she might have to have her left ovary and uterus removed also. She understands this. Should there be no significant pathology, I will just proceed with a tubal sterilization and she understands that. She does not want to have any more children. She realizes this procedure should be considered permanent, but not guaranteed to be so, that is, she could get pregnant again. I explained to her very carefully that she has other reasons for pain, and what I do to her through surgery could result in the pain being no better or even worse because of the multifactorial origin of her pain since she does have known Crohn's disease.

Donald Roland, M.D.

lds/app2.m1
D: 8-28-87
T: 8-29-87

Operative Report. Read about Operations and Surgery on pages 148-149, about Sutures on pages 149-150, and about Preparing the Operative/Surgical Report on page 151 in MEDICAL TRANSCRIPTION WITH ADVANCED TERMINOLOGY by Lois R. Tutherly. Use the information above and the sample below to set up a shell for this report. Remember, you may put as many side headings in your shell as you like; but you may not always use all of them in each operative report you create. Note on the sample that when the report is two or more pages long, you put "Continued . . ." at the bottom of each page followed by a second- or third-page heading on the next page.

Job 1C--Create a shell for an Operative Report.

OPERATIVE REPORT

PATIENT: Elaine J. Silverman

DATE: 6-20-87

HOSPITAL NO.: 80-32-11

ROOM NO.: 1308

PREOPERATIVE DIAGNOSIS:
1. Menorrhagia
2. Chronic pelvic inflammatory disease.
3. Perineal relaxation.

POSTOPERATIVE DIAGNOSIS:
1. Menorrhagia.
2. Chronic pelvic inflammatory disease.
3. Perineal relaxation.

ANESTHESIA: General

OPERATION:
1. Total abdominal hysterectomy.
2. Lysis of pelvic adhesions.
3. Bilateral salpingo-oophorectomy.
4. Appendectomy.
5. Posterior colpoplasty.

PROCEDURE: Under general anesthesia, the patient was prepared and draped for abdominal operation. The abdomen was opened through a Pfannenstiel incision, and examination of the upper abdomen was entirely normal. Examination of the pelvis revealed an enlarged uterus. The uterus was three degrees retroverted and adhered to the cul-de-sac. Both tubes and ovaries were involved in an inflammatory mass, with extensive adhesions to the lateral pelvic wall on both sides. The tubes revealed evidence of chronic pelvic inflammatory disease. The omentum was also attached to the fundus and to the left adnexa. The omentum was dissected by means of blunt and sharp dissection; the dissection was carried to each adnexa, freeing both tubes and ovaries by means of blunt and sharp dissection. The uterus was found to be approximately two times enlarged, after freeing all the adhesions. The utervesical fold of peritoneum was then incised in an elliptical manner, bladder was dissected off the lower uterine segment. The round ligament, infundibulopelvic ligament on each side was identified, clamped, cut, and ligated. The uterine artery on each side, was clamped, cut, and doubly ligated. Paracervical fascia was developed.

Continued . . .

Elaine J. Silverman
Page 2
Operative Report - 6-20-87

Heaney clamps were placed on the cardinal ligaments, the cardinal ligaments cut, and pedicles ligated. The vagina was circumscribed; the uterus, both tubes and ovaries were removed from the operative field. The cardinal ligaments were then sutured into the lateral angles of the vagina by means of interrupted sutures; the vagina was then closed with continuous over and over stitch. The paracervical fascia was sutured into place with interrupted figure of eight suture; the lateral suture incorporated the stumps of the uterine arteries; the pelvis was then reperitonealized with continuous length of CI 2-0 atraumatic suture. Appendix was identified, and appendectomy was done in the usual manner. The appendiceal stump was cauterized with phenol and neutralized with alcohol. Re-examination at this time of the pelvis revealed all bleeding well controlled. The abdominal wall was then closed in layers, and the skin was approximated with camelback clips. During the procedure, the patient received one unit of blood. Patient was then prepared for vaginal surgery.

Patient was placed in lithotomy position, prepared and draped. Posterior colpoplaty was begun, for repair of rectocele and perineal relaxation. The posterior vaginal mucosa was dissected from the perirectal fascia; the excess posterior vaginal mucosa was excised and perirectal fascia was brought together with continuous interlocking suture of 0 chromic. The posterior vaginal mucosa was closed with continuous interlocking suture of 0 chromic. Perineal body was closed with subcutaneous, subcuticular stitch. The patient withstood the operation well. Patient left the operating room in good condition.

SPONGE COUNT: There was correct sponge count.

Surgeon
Harold B. Cooper, M.D.

lds/app4.ml
D: 6-20-87
T: 6-21-87

Discharge Summary. Read about the Discharge Summary on page 206 and about Preparing the Discharge Summary on page 208 in MEDICAL TRANSCRIPTION WITH ADVANCED TERMINOLOGY by Lois R. Tutherly. Use the information above and the sample below to set up a shell for this report. Remember, you may put as many side headings in your shell as you like; but you may not always use all of them in each Discharge Summary you create. Note on the sample that when the report is two or more pages long, you put "Continued . . ." at the bottom of each page followed by a second- or third-page heading on the next page.

Job 1D-Create a shell for a Discharge Summary.

DISCHARGE SUMMARY

PATIENT: Jane M. Smith

ATTENDING PHYSICIAN: M. W. Dorwin, M.D.

HOSPTIAL NO.: 08-309-7890

ROOM NO.: 4392

ADMISSION DATE: 5-23-87

DISCHARGE DATE: 5-25-87

PRESENT ILLNESS: This 51-year-old, white female with a long history of COPD and steroid dependent asthma was admitted to the hospital because of increasing shortness of breath and wheezing. This is despite increasing her Prednisone from 20 mg a day up to 60 mg a day three days previously. The patient uses a nebulizer at home every four hours with Alupent 0.3 ml and 3 ml of saline, utilizes both Ventolin and Vanceril Inhalers four times daily, and takes Theo-Dur 300 mg t.i.d. and Ventolin.

PHYSICAL EXAMINATION: At the time of admission, the patient was in moderate respiratory distress. She was afebrile.

HEENT: Showed only that she was using accessory muscles of respiration.

LUNGS: Auscultation revealed diffusely diminished breath sounds with mild expiration wheezing. She had virtually no ability to augment her respirations.

CARDIOVASUCLAR: Revealed no JVD or peripheral edema. Her cardiac sound were quite distant.

ABDOMEN: Soft and nontender.

RADIOGRAPHICAL DATA: Chest x-ray showed hyperinflation consistent with chronic asthem or COPD. No infiltrates were present.

LABORATORY DATA: She was admitted to the hospital with a HGB of 17.2, HCT 51, WBC count 15,800, with 1 band, 97 segs, 2 lymphs. UA was normal. She had an FBS of 95. Sputum culture grew normal flora. ABGs on room air on admission showed a pO_2 of 58, a pCO_2 of 41, and a pH of 7.43.

Continued . .

Jane M. Smith
Page 2
Discharge Summary - 5-25-87

HOSPITAL COURSE: The patient was placed on high doses of steriods and vigorous respiratory therapy. She very gradually improved. She was noted to hypertensive and was placed on Minipress 1 mg b.i.d. At the time of discharge, she remains breathless with any exertion; but is certainly more stable.

FINAL DIAGNOSES:

1. SEVERE STEROID-DEPENDENT ASTHEM.
2. CHRONIC OBSTRUCTIVE PULMONARY DISEASE.
3. OSTEOPOROSIS IN SOME VERTEBRAL COLLAPSE.
4. HYPERTENSION.

DISPOSITION: The patient is being discharged to home on a no-added salt diet and activity as tolerated. Her medicines to be taken regularly include (1) Theo-Dur 300 mg P.O. t.i.d., (2) Prednisone 20 mg P.O. daily, (3) Organidin Elixir one teaspoon P.O. q.i.d., (4) Os-Cal 500 mg one P.O. t.i.d., (5) Minipress 1 mg P.O. t.i.d., (6) Entex LA one P.O. b.i.d., and (7) nebulizer therapy q.i.d. with Alupent 0.3 ml and Ental Solution 20 mg mixed.

The patient is to take on a p.r.n. basis (1) Proventil (or Ventolin) Inhaler two whiffs every one to two hours as needed and (2) Proventil (or Ventnolin) tablets 4 mg P.O. q. six hours p.r.n.

The patient has been given a followup visit in one week. She will continue to see Dr. Randle on a regular basis.

W. M. Darwin, M.D.

lds/app3.m1
D: 5-29-87
T: 5-31-87

Short-Stay Report. When the patient is being admitted for 48 hours or less, a shortened form of the history and physical examination report is acceptable in most hospitals. This form is appropriate for many diagnostic procedures and minor operative procedures. The statistical data would be the same as required on the longer reports, but the description of the patient's condition and the physical examination would be considerably condensed.

Below is a sample of a Short-Stay Report. From this sample, create a shell using the centered headings and the major side headings. Remember you may put as many side headings in your shell as you like, but you may not always use all of them in each Short-Stay Report you create.

Job 1E--Create a shell for a Short-Stay Report.

SHORT-STAY REPORT

NAME: Jamie T. Roland

HOSPITAL NO.: 543098

ROOM NO.: 354

ADMISSION DATE: 6-8-87

ATTENDING PHYSICIAN: Peter A. Nelson, M.D.

HISTORY: Patient is a 6-year-old male complaining of frequent episodes of tonsillitis. He has missed several weeks of school this spring because of infections. He is a constant mouth breather. He snores loudly at night. He has constant nasal obstruction. There is no history of earaches.

PAST HISTORY: There are no allergies. Bleeding history: None. Operations: None. Illnesses: None. Medications: Vitamins, iron. Has been on Penicillin for resolution of symptions. Family History: Noncontributory.

PHYSICAL EXAMINATION: Skin: No rashes. ENT: Ears: TM and canals appeared normal. Nose: Congested posteriorly but not anteriorly. Throat: Very large cryptic tonsils meeting in the midline. Neck: Numerous palpable nodes.

CHEST: Lungs: Clear to percussion and auscultation. Heart: Not enlarged, normal sinus rhythm, no murmurs.

ABDOMEN: Soft, nontender

EXTREMITIES: Full range of motion.

NEUROLOGICAL: Completely normal

IMPRESSION: Chronic hypertrophic tonsils and adenoids with recurrent infections.

RECOMMENDATION: Tonsillectomy and adenoidectomy.

_____
Peter Anthony Nelson, M.D.

lds/app5.ml
D: 6-8-86
T: 6-8-86

Radiology Report. Read about the Radiology Report on pages 82-83 and about Arranging the Radiology Report on pages 83-85 in MEDICAL TRANSCRIPTION WITH ADVANCED TERMINOLOGY by Lois R. Tutherly. Use the information above and the sample below to set up a shell for this report. Remember, you may put as many side headings in your shell as you like; but you may not always use all of them in each Radiology Report you create. Note on the sample that when the report is two or more pages long, you put "Continued . . ." at the bottom of each page followed by a second-page heading on the next page.

Job 1F--Create a shell for a Radiology Report.

RADIOLOGY REPORT

NAME: Elaine J. Silverman

HOSPITAL NO: 80-32-11

ROOM NO.: 4321

PROCEDURE: Nuclear Medicine Therapy

RADIOLOGY NO.: 43200

ATTENDING PHYSICIAN: Harold B. Cooper, M.D.

DATE: 6-14-87

PART BEING TREATED: Acinus of adrenal gland

CLINICAL DIAGNOSIS: Malignant neoplasm of adrenal gland

CLINICAL HISTORY: Patient suffered from adenophathy for ten years. Five years ago, there was an adenocele. Two years ago, there was an adenocystoma, for which she was treated with roentgenotherapy, following which her health improved. She had no further problems until five months ago when the adenosarcoma was found. Patient has had no previous treatment by any radioactive substance.

INTERPRETATION: The patient was prepared, positioned, and received the first of a series of cobalt-60 teletherapy treatments.

IMPRESSION: The initial dose of the radioactive isotope was administered. The patient stood the treatment well and was returned to her hospital room. She will return tomorrow for the second treatment of the series of five.

Radiologist _____ M.D.

lds/app6.ml
D: 6-14-86
T: 6-15-86

Pathology Report. Read about Introduction to Pathology and Pathology Reports on pages 110-111, about Commonly Used Abbreviations in Pathology on page 111, about Commonly Used Stains in Pathology on pages 112-113, and about Preparing the Pathology Report on page 113 in MEDICAL TRANSCRIPTION WITH ADVANCED TERMINOLOGY by Lois R. Tutherly. Use the information above and the sample below to set up a shell for this report. Remember, you may put as many side headings in your shell as you like; but you may not always use all of them in each Pathology Report you create. Note on the sample that when the report is two or more pages long, you put "Continued . . ." at the bottom of each page followed by a second- and third-page heading on the next page.

Job 1G--Create a shell for a Pathology Report.

PATHOLOGY REPORT

NAME: Elaine J. Silverman

HOSPITAL NO.: 08-3123-87

ROOM NO: 1308

PHYSICIAN: Harold B. Cooper, M.D.

DATE: 6-20-87

PATHOLOGY NO.: 430211

SPECIMEN SUBMITTED: Tissue from left forearm

GROSS DESCRIPTION: Specimen is an elliptical segment of cutaneous tissue which exhibits hemorrhage in the subcutaneous adipose tissue of recent origin. The specimen measures 10 x 7 x 5 mm. There is cylindrical shaped segment of gray, moderately firm material measuring 6 x 1 cm. Thin is sharp and consistent with a foreign body. The cutaneous and subcutaneous tissue is bisected and is totally embedded.

MICROSCOPIC DESCRIPTION: Examination reveals a well-demarcated dermal neoplasm. There are clear cells and squamous cells in this well-demarcated area and association with ductal structures resembling sweat gland ducts and containing some clear cells is present. Areas of hyalinization and fibrosis are also present. Recent areas of hemorrhage are associated with the neoplasm. Cystic spaces within the neoplasm are present. Individual nuclei are found and mitotic figures are not seen.

DIAGNOSIS: Tissue from left forearm: Eccrine spiradenoma, benign.

_____ M.D.
Pathologist

lds/epp7.ml
D: 6-20-87
T: 6-21-87

MEDICAL ABBREVIATIONS

NOTE: When any of these terms are given, you must use these abbreviated form. This is a list of the most commonly used abbreviations with medications; therefore, it must be typed exactly as it is written here.

Orders for medications

q.i.d.	-four times a day
q.	-every
P.O.	-by mouth, orally
h.s.	-at bedtime
b.i.d.	-twice a day
t.i.d.	-three times a day
P.O. q.i.d.	-by mouth four times a day
q.d.	-every day
q.o.d.	-every other day
a.m.	-morning
p.m.	-evening
NPO	-nothing by mouth
1/4 normal saline	- when they say one-quarter normal saline
a.c.	-before meals

Measurement

gm	-grams
mm	-millimeters
ml	-milliliters
cm	-centimeters
mcg	-micrograms
dl	-deciliter
meq/l	-milliequivalent per liter
kg	-kilograms
ng	-nanograms
lb	-pound or pounds(do not use s with plural--pounds)
oz	-ounce or ounces(do not use s with plural--ounces)

Medical Abbreviations

h.p.f.	-high power field
p.r.n.	-according as circumstances may require
HEENT	-head. eyes. ears. nose. & throat
GI	-gastrointestinal
GU	-genitourinary
M.D.	-Doctor of Medicine
Ph.D.	-Doctor of Philosophy (Harold LeCrone, Ph.D., Clinical Psychologist)
ER	-Emergency Room
OR	-Operating Room

RR -Recovery Room
CCU -Coronary Care Unit
ICU -Intensive Care Unit
PCU -Post-Coronary Care Unit
D&C -dilatation and curettage (except when in all caps, then spell out)
T&A -tonsillectomy and adenoidectomy (except when in all caps, then spell out)
VA Hospital -no periods

Abbreviations or Short Forms for Lab Work

pCO_2 -carbon dioxide pressure
pO_2 -partial pressure of oxygen
UR -urinalysis
WBCs -white blood cells
RBCs -red blood cells
EKG -electrocardiogram
EEG -electroencephalogram
segs -segmented neutrophils
basos -basophils
lymphs -lymphocytes
eos -esoimophils
sed rate -sedimentation rate
RPR card test -test for veneral disease
VDRL -test for veneral disease
A Rh positive -blood type (Rh - Rhesus factor)
pH -hydrogen ion concentration of UA
sp. gravity -specific gravity of UA
monos -monocytes
HGB -hemoglobin
HCT -hematocrit
CBC -complete blood count
guaiac -stool culture for guaiac
Strep -Streptococcus
Staph -Staphylococcus
beta hemolytic Strep -only Strep is capitalized
Staphylococcus aureus - only Staph is capitalized
pap smear -Papanicolaou's smear
MCD -mean corpuscular diameter (blood count)
MCH -mean corpuscular hemoglobin (blood count)
MCHC -mean corpuscular hemoglobin concentration (blood count)
MCV -mean corpuscular volume (blood count)
PCV -packed cell volume
polys -polymorphonuclear leukocytes
PPT -partial thromboplastin time
RA Latex -test for rheumatoid arthritis
FBS -fasting blood sugar
E.coli -Escherichia coli
TIBC -total iron binding capacity
ANA -antinuclear antibody anaerobe
Coombs' test -direct or indirect

CSF -cerebrospinal fluid
C&S -culture and sensitivity
F. -Fahrenheit
GC -gonorrhea
GTT -glucose tolerance
test I131 -uptake test for thyroid megakaryocyte
LE -lupus erythematosus

History and Physical Report

Name: - Mr. Ezra Dryden
Hospital No. - 21321 42
Room No. - 391
Date of admission 5-11-87
Attending Physician - Dr. A.F. Finlay

Chief Complaint - "Fell off a ladder and hurt my back."

Present Illness - This 52-year-old white man has been in excellent health all his life. Three days ago while attempting to do some work around the house (,) he slipped and fell approximately (two/2) steps from a stepladder, landing on his back. At the time (,) he was seized with pain in the (lumbrosacral/lumbosacral) area and was unable to move. Since then his wife has cared for him at home with no relief of the pain (; ,) actually, it has increased in severity. He was brought to the (ER/Emergency Room) yesterday and (,) x-rays were taken which showed no abnormal findings. He was unable to move, unable to get out of bed, care for himself (; ,) and consequently (,) he was hospitalized.

Past History - He had the usual childhood diseases. Has also had influenza but no other illnesses. No surgery.

Social History: Prior to his retirement (, /) the patient worked as a carpenter. He neither drinks nor smokes.

Family History: His father died at age 84 from (pneumonia / neumonia), and his mother died at age 80 from injuries sustained in a car accident. He has one sister who died at age 30 from diabetes.

Review of Systems

Cardiovascular: Normal. No history of rheumatic fever, hypertension, or coronary heart disease. There is no dyspnea, no ankle edema. He does not take any medications for his heart or blood pressure.

Respiratory: No history of pneumonia, (pleurisy/ pleurisy), or tuberculosis. No chronic cough and no hemoptysis.

Gastrointestinal: He has a good appetite (, / ,) he maintains his weight well at approximately 180 lbs. There is no history of ulcers or jaundice (, /) but he has

had some abdominal discomfort the last (two/2) days. He has normal bowel movements, with the aid of Fenamint tablets every other day.

Genitourinary: He has nocturia (1x); no dysuria, pyuria, or hematuria. No history of renal colic.

Neuromuscular: No previous history of fractures or dislocations

Physical Examination

General: This is a well-nourished (, /) well-developed white man who appears considerably younger than his stated age of 82 years. He is mentally clear, is well oriented as to time and place, and is an excellent historian. He is resting quite comfortably (, /) but he is complaining of pain in his lower back and also of some abdominal distress. Vital signs — temperature, 98.4; blood pressure, 180/94 m m. Hg; respiration rate, 16/min; pulse rate, 90 beats per minute.

Head and neck: Head — no tenderness;

no masses palpable. Eyes - pupils round and equal, react to light and accommodation; sclerae clear. Ears - tympanic membranes not injected or inflamed; no discharge. Nose - normal nasal mucosa; no discharge. Mouth - edentulous, wears full dentures. Throat - no pathological findings. Neck - thyroid gland not palpable, no nodes palpable.

Chest: Normal expansion. Heart - rate is 92 and regular; no murmurs heard; no apparent heart enlargement. Lungs - clear and resonant to percussion and auscultation; no rales heard. Breasts - normal male; no masses palpable.

Abdomen: Considerably distended; liver, kidneys and spleen not palpated; no masses palpated, however, loops of bowel are felt through the abdominal wall; bowel sounds are practically absent and occasional tinkling is heard, no hernias.

Rectal: Deferred at this time.

Genitalia: Normal male.

Extremities: Symmetrical; normal reflexes; no edema

Provisional Diagnosis: 1. Lumbosacral strain, rule out fracture of this area
2. Paralytic ileus
3. Generalized (arteriosclerosis / arteriosclerosis)

Consultation Report

Name -John Smith
Hospital No.- 876-321
Room No.- 244
Attending Physician - Robert G. Sampson
Date -6-27-87

Reason for Consultation:

This is a 62-year-old, white male referred to me in consultation by Dr. John Smyth and seen because of a (lesion / lession) seen on barium enema examination.

For the past two months (, /) the patient has noticed a change in his bowel habits, with increasing frequency of defecation, up to six times a day, softening the consistency of his stool; and the appearance of mucus and blood mixed in with the stool. He also reports a sensation of incomplete evacuation of stool occasionally, but no tenesmus. In the past two months, he has complained of lower abdominal cramping pain, relieved by defecation.

His appetite has been good (, /) but he has lost twelve pounds during this interval. He has remained, however, quite active physically.

A barium enema examination was obtained by Doctor Smyth two weeks ago, and this showed a constricting lesion of the (rectosigmoid / rectosigmoid). I have reviewed this x-ray, and this most certainly represents a carcinoma. A chest x-ray done today discloses a large density in the left lower lobe which is quite compatible with a lung metastasis. Liver scan performed today showed two large densities in the liver which, again, are most compatible with liver metastases. Alkaline phosphatase is 95, LDH 375, and the remainder of the SMA 12/60 panel is normal. Examination reveals blood pressure of 120/80, pulse 84, respirations 20, temperature 98.6.

Physical Examination:
(This is a well-developed, well-nourished, white male who appears in generally good condition and is rather vigorous for his age. There is no pallor or jaundice. Chest: Clear to percussion and (auscultation / aussultation). Heart: Regular sinus rhythm. No murmurs audible.

Abdomen:
There is a left upper paramedian scar (from some sort of hernia operation many years ago), a diagonal right lower quadrant scar (from an appendectomy), and bilateral groin scars (from herniorrhaphies). The liver is one fingerbreadth below the right costal margin. The kidneys, spleen, and other masses are not (palpable/ nalpable) and no tenderness if elicited.

Sigmoidoscopy:
This was performed by Doctor Smyth with me present. The standard size Welch - Allyn sigmoidoscope can pass to 13 cm, and beyond this the bowel becomes too angulated and fixed for further introduction. A narrow sigmoidoscope could be advanced another 2cm to 15 cm above the anal verge (, /;) and at this point, the distal border of a fungating lesion is seen which appears to be a (carcinoma/carcinoma). Because only a narrow instrument could be inserted here, and adequate biopsy could not be obtained.

Impression:
Carcinoma of the rectosigmoid with liver and lung metastases.

Discussion:
The question of whether surgery (anterior resection) would benefit this patient can be resolved only by estimating his prognosis. Statistically, the patients with metastases of this sort live for an average of approximately six months, although one year to eighteen months with this sort of spread is certainly not unheard of. Since he probably does not have very long to live with his tumor (,/) the patient may very well succumb to his disseminated metastases before the tumor obstructs locally. For this reason, I think that even a palliative resection of this rectosigmoid carcinoma would probably not be indicated at this time (;/;) and in the event that a large bowel obstruction occurs, a palliative transverse (colostomy/ colostotomy) can be done at that time. I would recommend that the patient be seen in consultation by a radiation

therapist and a chemotherapist in the hopes that the local lesion could possibly be kept under control so that his local bowel symptoms would not cause an obstruction in the near future.

If I can be of any future service to you in this case (, /) I shall be very happy to do so. Thank you very kindly for permitting me to see this very pleasant gentleman in consultation.

Operative Report

Name :- Mrs. Velda Downer
Hospital No. - 213147
Room No. - 396
Date - 2-28-87
Surgeon - Dr. G. T. Wiggand

Preoperative Diagnosis - Coarctation of the aorta
Postoperative Diagnosis - Coarctation of the aorta
Anesthesia - General
Operation - Resection of coarctation of the aorta and replacement with dacron graft.

Findings - The patient had a typical postductal coarctation of the descending aorta with a fairly long narrow segment. The left common carotid artery originated from the aortic arch quite close to the subclavian artery..

Procedure - Under general anesthesia the left (hemithorax / hemithorax) was entered through a (posterolateral / posterolateral)

thoracotomy incision in the fourth intercostal space. The lung was retracted anteriorly and the mediastinal pleura overlying the descending aorta and left subclavian artery was incised, and these vessels dissected free of the surrounding structures. Cord tape was placed around the subclavian artery. The aorta was dissected free. The vagus and recurrent nerves were identified and retracted away from the aortic arch(,/) and a cord tape placed around the arch just distal to the origin of the common carotid and proximal to that of the subclavian. Following this, the distal coarctated segment of the aorta was dissected free from surrounding structures. A single intercostal artery was divided and tied with No. 4-0 silk and a cord tape placed across the aorta distally. A straight vascular clamp was placed on the left subclavian artery and an atrial (appendage/appenage) clamp which was placed on the aortic arch also included a portion of the subclavian, but allowed the carotid to fill completely. An angle coarctation clamp was placed on the aorta

distally (,/) and the coarctated segment was then resected. A primary anastomosis was not performed (,/) because it was determined that insufficient tissue had been removed and the vessels were under too much tension. For this reason, a No. 18 dacron graft with a total length of about 1-3/4 inches was used to bridge the anastomosis, each end being sutured into place with a running suture of No. 4-0 Ferdek. The proximal anastomosis was performed first. After completion of the anastomoses (,/) the distal clamp and then the proximal clamp was removed. The total period of time in which the aorta was clamped was 34 minutes. There were three small bleeding points in the anastomoses and each required a single suture of No. 4-0 Ferdek. After this (,/) hemostasis was complete. The mediastinal (pleura/plaura) was then closed over the graft. A single chest tube was laid in the apex of the (thoracic/thoracic) cavity

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Discharge Summary

Name: Mrs. Leslie Konrad

Hospital No.: 213151

Room No.: 400

Attending Physician: Dr. N. A. Misci

Admitting Date: 9-29-87

Discharge Date: 10-7-87

Present Illness: This is a 20-year-old woman, para one, grama two, whose previous pregnancy ended five months ago with the delivery of a full-term infant. After the birth of her child (,1) she began taking oral contraceptives for birthcontrol purposes. Because of the nausea which followed, the patient stopped taking the pills on August 14, 1987, but did not have a menstrual period until August 24, 1987. At that

time (,/) she bled heavily for five days, using more than one box of pads per day. Around September 17, 1987, the patient developed right lower (quadrant/quadrent) pain of increasing severity without significant radiation. At the time of her normal menstrual period, on September 24, 1987, the patient spotted for two days and then stopped. She came to the hospital because of an increase in the right lower (quadrant/quadrent) pain. Past history revealed that the patient was hospitalized in 1967 for an episode of acute pelvic (inflamatory/inflammatory) disease.

Physical Examination: Examination. showed the following findings: blood pressure, 120/78 m.m. Hg.; pulse rate, 99 beats per minute;

respiration rate, 20/min. Head, ears, eyes, nose, and throat were normal. The lungs were clear to auscultation and percussion. The heart revealed a slight (tachicardia/tachycardia) without murmurs. Examination of the abdomen revealed it to be soft with some right lower (quadrent/quadrant) tenderness, but without rebound. Bowel sounds were normal. Pelvic examination revealed the uterus to be firm and normal in size. The right adnexa revealed a tender, slightly mobile mass, measuring 3 x 5 cm in the cul-de-sac. The left adnexa was normal.

Provisional Diagnosis: Suspected ectopic pregnancy.

Laboratory evaluation: Studies disclosed the following values: hematocrit, 33% on admission (9-29-87): 31% on 10-1-87: 35.2% on

10-6-87; blood urea nitrogen, 4 mg./1ccc hemoglobin, 10.5 gm./100cc.; white blood cell count 6,200; urinalysis, within normal limits; urine culture taken 9-29-87 revealed Klebsiella bacteria: repeat culture on 10-6-87 was negative; (Pap/ Papanicolaou) smear showed Class I reaction; serology, negative; pregnancy test, positive.

Hospital Course: The patient was given intravenous fluids and surgical liquids. She continued to complain of right lower (quadrent/ quadrant) pain but remained (afebrille/afebrile). On October 1, 1987, pregnancy test results were positive. Because of the right adnexal mass, it was decided to observe the patient for another 24 hours and if the symptoms persisted to perform an exploratory laparotomy. On

October 2, 1987, the patient continued to have abdominal pain and began complaining of dizzy spells.

She was taken to the operating room (,1) and the laparotomy was performed. The postoperative course was uncomplicated (,1) and the patient was discharged in satisfactory condition on October 7, 1987.

Recommendations: Discharged with medication Furadantin, 100 mg. four times daily, for ten days. She is to return to the clinic in approximately two weeks.

Final Diagnoses: 1. Corpus luteum cyst of right ovary.
2. Pregnancy

History and Physical Report

Name: — Jim A. Johnson
Hospital No. — 46-239
Room No. — 426
Admission date — 9-3-87
Attending Physician — Donald Sharp, M.D.

Chief Complaint — Right knee pain

History of Present Illness: This 16-year-old male was running through the line during a football game today when he was tackled by several players. He fell (,/) twisting his right knee. He tried to stand and the knee gave out. He hopped off the field. He was unable to walk on the leg and was brought to General Hospital. The patient denies previous injury to this knee.

Childhood History: Usual childhood (deseases/diseases) without (sequelea/sequelae).
Previous hospitalizations: Patient was
Family History: no significant Abnormalities

hospitalized once as a child for work on his teeth. No other hospitalizations or operations.

Allergies: none.
Medications: none.

Review of Systems: No significant abnormalities. Patient is in excellent health and in excellent physical condition.

Physical Examination: Reveals a muscular, teenaged, white male in moderate distress with right knee pain. Heent: (Pupils/pupils) are equal and react to light. (Sclera/Sclerae) are clear. Dentition is in good repair. There is no cervical tenderness or limitation of motion. Chest: Lungs clear to auscultation. No rib tenderness. Heart: Regular rate, no murmur. Abdomen: Soft and nontender, no masses, good bowel sounds. Right knee: Reveals medial joint line tenderness. There is slight tenderness over the adductor tubercle. There is no tibial tenderness. Anterior cruciate ligament appears to be intact. There is gross instability of the medial collateral ligament. There is no rotatory instability.

Range of motion is 10 to 130 degrees on the right, 0 to 135 degrees on the left. There is no effusion in the right knee. Quadriceps mechanism is intact. There is no (neurovascular/muerovascular) problem of the right leg.

Diagnosis: Medical (collateral/colateral) ligament tear:
Probable medical meniscal tear.
Possible anterior cruciate ligament tear, right knee.

History and Physical Report

Name: Carrie Johnson
Hospital No: 39-6742
Room No: 4262
Admission Date: 7-28-87
Attending Physician: Tom Lucas, M.D.

Admission Diagnosis: Status post-operative surgery, right elbow.

Present illness: This (12-year-old / 12 year old) male was admitted with a fracture dislocation of the right elbow which was reduced, closed, and then pinned with 4 K wires to fix a displaced medial (epicondyle / epicondile). The patient did well and was discharged (, /) and one week prior to this admission. entered to have the cast removed. He is admitted at this time for elective removal of the K wires now seven weeks post open reduction / internal fixation.

Past medical history: See old chart.

The patient has known ALLERGIES TO ASPIRIN AND POSSIBLY TO PENICILLIN. He developed (thrombocytipenia, thrombocitopenia) purpura at the age of five, possibly secondary to aspirin which he was taking to control headache.

Social History: The patient lives with his parents and attends 7th grade. He has a brother and a sister.

Family History: Unremarkable.

Physical Examination:

Vital signs: Blood pressure 116/70. Pulse 80 and regular. Afebrile.

Heent: Negative.

Chest: Clear to auscultation.

Cardiovascular: Normal sinus rythm, no murmurs or gallops.

Abdomen: Soft, non-tender. NO (organomegaly / organomegally).

Extremities: Soft gauze dressing over the right elbow when removed reveals a draining sinus over the medial aspect of the elbow with gross (purulence / purulance). No evidence of erythema or tenderness, however. Sinus is in the center of an otherwise healing surgical incision. The patient has flexion of the elbow to 120 degrees and extension limited to -40 degrees. Pronation and (~~supination~~ / supination) intact.

Impression: Infected right elbow wound, post open reduction / internal fixation of the medial (epicondyle / epicondille).

Radiology Report

Name: Mrs. Melda Ming
Hospital No. - 213145
Room No. - 394
Attending Physician - Dr. S. T. Oates
X-Ray No. - 694
Date: 6-2-87

Interpretation: Barium enema examination reveals marked ulcerative areas and nodular to (pseudopolypoid/pseudopolypoid) formations throughout the colon beginning in the region of the midsigmoid and becoming progressively more severe in the proximal portions. There is some limited distensibility in these areas and considerable (irritability/irritability) and spasticity which is most prominent in the (secum/cecum) and ascending colon. There is reflux of barium into the terminal (ilium/ileum) which does not appear to be involved with any back-wash ileitis or changes that would

raise the question of regional ileitis.

The rectum and distal portion of the sigmoid colon show no lack of distensibility and very little in the way of any ulcerations. However, (,/) this area as well as the remaining portions of the colon show extensive mucosal involvement on the postevacuation film.

These changes are strikingly increased over the relatively mild changes of small ulcerations seen on the barium enema examination of 1-12-87.

Impression: Findings, as described above, are considered to represent marked ulcerative colitis, progressively more severe in the proximal portion of the colon. The terminal ileum appears normal. The very remote possibility that these changes could be related to granulomatous colitis is extremely unlikely.

Pathology Report

Name:- Miss Heidi George
Hospital No.- 213150
Room No.- 399
Laboratory No.- P-100
Date - 6-27-87
Attending Physician - Dr. J.S. Jorden
Specimen submitted - Gallbladder

Gross Description: The previously opened gallbladder is about 10.5 cm long and about 2.5 cm in diameter. The mucosal surface is slightly coarse and exhibits fine yellow speckling. The wall is questionably slightly thickened. At the apex is a small nodular thickening of the gallbladder wall about 1.1 cm in diameter. From the mucosal aspect (,/) it presents a slight elevation with a slight central depression. The cut surfaces reveal a thickened nodular area about 0.6 cm thick and containing grossly visible (,/) fine glandular or (sistic/cystic) spaces

eluding a slight amount of mucoid material. Separately included are two (calculo/calculi). The calculus is somewhat barrell shaped, measures 3x3 cm in diameter and is an amber color. It is hard, and it has a partly smooth and partly fine (granular/granular) external surface. It cuts without difficulty to reveal a crystalline structure. The second smaller calculus has a configuration of a cone with two pancake-facets on opposite ends. It measures 1.1 cm in diameter and 0.7 cm in length. It is a dark brownish yellow and externally is moderately smooth. Sections of the gallbladder are embedded.

-Microscopic Description: The gallbladder shows blunting of the mucosal folds and focal mucous gland metaplasia. Small aggregates of foamy (histiocites/histiocytes) are seen in the tips of some mucosal folds. The muscularis is markedly hypertrophied. There is little fibrosis. A moderate chronic inflammatory cell infiltration is present in the mucosa and focally in the muscularis. The module at the apex is composed of a (proleferation/proliferation)

of glandular spaces, some dilated deep within the wall of the gallbladder (, /) but largely external to the muscular layer. These glands are surrounded by a coarse pattern of (proleferation/proliferation) of the smooth muscle.

Pathological Diagnosis:

1. Cholelithiasis
2. Chronic cholecystitis and cholesterolosis of gallbladder
3. Adenomyosis of apex of gallbladder

HEALTH INSURANCE CLAIM FORM

☐ MEDICARE ☐ CHAMPUS ☐ BLUE SHIELD ☐ OTHER

(CHECK ONLY ONE)

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

Form Approved OMB No. 09-R380

PATIENT & INSURED (SUBSCRIBER) INFORMATION

1. PATIENT'S NAME (First name, middle initial, last name)

2. PATIENT'S DATE OF BIRTH

3. INSURED'S NAME (First name, middle initial, last name)

4. PATIENT'S ADDRESS (Street, city, state, ZIP code)

TELEPHONE NUMBER

5. PATIENT'S SEX — MALE ☐ FEMALE ☐

6. PATIENT'S RELATIONSHIP TO INSURED — SELF ☐ SPOUSE ☐ CHILD ☐ OTHER ☐

7. INSURED'S I.D. or MEDICARE NO (Includes any letters)

8. INSURED'S GROUP NO. (Or Group Name)

9. OTHER HEALTH INSURANCE COVERAGE - Enter Name of Policyholder and Plan Name and Address and Policy or Medical Assistance Number

10. WAS CONDITION RELATED TO
A. PATIENT'S EMPLOYMENT — YES ☐ NO ☐
B. AN ACCIDENT — AUTO ☐ OTHER ☐

11. INSURED'S ADDRESS (Street, city, state, ZIP code)

12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE (Read back before signing)
I Authorize the Release of any Medical Information Necessary to Process the Claim and Request Payment of MEDICARE CHAMPUS Benefits Either to Myself or to the Party Who Accepts Assignment Below

SIGNED DATE

13. I AUTHORIZE PAYMENT OF MEDICAL BENEFITS TO UNDERSIGNED PHYSICIAN OR SUPPLIER FOR SERVICE DESCRIBED BELOW
NOT APPLICABLE TO BLUE SHIELD.

SIGNED (Insured or Authorized Person)

PHYSICIAN OR SUPPLIER INFORMATION

14. DATE OF ILLNESS (FIRST SYMPTOM) OR INJURY (ACCIDENT) OR PREGNANCY (LMP)

15. DATE FIRST CONSULTED YOU FOR THIS CONDITION

16. HAS PATIENT EVER HAD SAME OR SIMILAR SYMPTOMS? YES ☐ NO ☐

16A. IF AN EMERGENCY CHECK HERE ☐

17. DATE PATIENT ABLE TO RETURN TO WORK

18. DATES OF TOTAL DISABILITY FROM THROUGH

DATES OF PARTIAL DISABILITY FROM THROUGH

19. NAME OF REFERRING PHYSICIAN OR OTHER SOURCE (e.g. family member, agency)

20. FOR SERVICES RELATED TO HOSPITALIZATION GIVE HOSPITALIZATION DATES ADMITTED DISCHARGED

21. NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED (If other than home or office)

22. WAS LAB WORK DONE OUTSIDE YOUR OFFICE? YES ☐ NO ☐ CHARGES

23A. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. RELATE DIAGNOSIS TO PROCEDURE IN COLUMN E BY REFERENCE NUMBER 1, 2, 3, ETC OR DX CODE

1
2
3
4

23B
EPSDT YES ☐ NO ☐
FAMILY PLANNING YES ☐ NO ☐
PRIOR AUTHORIZATION NO

24. A DATE OF SERVICE FROM	TO	B PLACE OF SERVICE	C TOS	D PROCEDURES, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN — PROCEDURE CODE (IDENTIFY)	(EXPLAIN UNUSUAL SERVICES OR CIRCUMSTANCES)	E DIAGNOSIS CODE	F CHARGES	G DAYS OR UNITS	H LEAVE BLANK

25. SIGNATURE OF PHYSICIAN OR SUPPLIER
(If agency must see information on the reverse apply to this bill and sign as agent)

SIGNED DATE

26. ACCEPT ASSIGNMENT (FOR GOVERNMENT CLAIMS ONLY SEE BACK) YES ☐ NO ☐

27. TOTAL CHARGE

28. AMOUNT PAID

29. BALANCE DUE

30. YOUR SOCIAL SECURITY NO

31. PHYSICIAN'S OR SUPPLIER'S NAME ADDRESS ZIP CODE & I.D. NO

91 001 **EH 19257 **

James T. Smith, M.D.
1234 Sun Valley
Waco, TX 76710

32. YOUR PATIENT'S ACCOUNT NO

33. YOUR EMPLOYER I.D. NO

34. YOUR TELEPHONE NO

817-757-2389

HEALTH INSURANCE CLAIM FORM

☐ MEDICARE ☐ CHAMPUS ☐ BLUE SHIELD ☐ OTHER

(CHECK ONLY ONE)

READ INSTRUCTIONS BEFORE COMPLETING OR SIGNING THIS FORM

Form Approved OMB No. 09 380091

PATIENT & INSURED (SUBSCRIBER) INFORMATION

1. PATIENT'S NAME *(First name, middle initial, last name)*

2. PATIENT'S DATE OF BIRTH

3. INSURED'S NAME *(First name, middle initial, last name)*

4. PATIENT'S ADDRESS *(Street, city, state, ZIP code)*

TELEPHONE NUMBER

5. PATIENT'S SEX
MALE ☐ ☐ FEMALE

6. INSURED'S I.D. or MEDICARE NO. *(Include any letters)*

7. PATIENT'S RELATIONSHIP TO INSURED
SELF ☐ SPOUSE ☐ CHILD ☐ OTHER ☐

8. INSURED'S GROUP NO. *(Or Group Name)*

9. OTHER HEALTH INSURANCE COVERAGE - Enter Name of Policyholder and Plan Name and Address and Policy or Medical Assistance Number

10. WAS CONDITION RELATED TO
A. PATIENT'S EMPLOYMENT
YES ☐ ☐ NO
B. AN ACCIDENT
AUTO ☐ ☐ OTHER

11. INSURED'S ADDRESS *(Street, city, state, ZIP code)*

12. PATIENT'S OR AUTHORIZED PERSON'S SIGNATURE *(Read back before signing)*
I Authorize the Release of any Medical Information Necessary to Process the Claim and Request Payment of MEDICARE CHAMPUS Benefits Either to Myself or to the Party Who Accepts Assignment Below

SIGNED DATE

13. I AUTHORIZE PAYMENT OF MEDICAL BENEFITS TO UNDERSIGNED PHYSICIAN OR SUPPLIER FOR SERVICE DESCRIBED BELOW
NOT APPLICABLE TO BLUE SHIELD

SIGNED *(Insured or Authorized Person)*

PHYSICIAN OR SUPPLIER INFORMATION

14. DATE OF

ILLNESS (FIRST SYMPTOM) OR INJURY (ACCIDENT) OR PREGNANCY (LMP)

15. DATE FIRST CONSULTED YOU FOR THIS CONDITION

16. HAS PATIENT EVER HAD SAME OR SIMILAR SYMPTOMS?
YES ☐ ☐ NO

16A. IF AN EMERGENCY
CHECK HERE ☐

17. DATE PATIENT ABLE TO RETURN TO WORK

18. DATES OF TOTAL DISABILITY
FROM THROUGH

DATES OF PARTIAL DISABILITY
FROM THROUGH

19. NAME OF REFERRING PHYSICIAN OR OTHER SOURCE *(e.g., public health agency)*

20. FOR SERVICES RELATED TO HOSPITALIZATION GIVE HOSPITALIZATION DATES
ADMITTED DISCHARGED

21. NAME & ADDRESS OF FACILITY WHERE SERVICES RENDERED *(If other than home or office)*

22. WAS LABORATORY WORK PERFORMED OUTSIDE YOUR OFFICE?
YES ☐ ☐ NO CHARGES

23A. DIAGNOSIS OR NATURE OF ILLNESS OR INJURY. RELATE DIAGNOSIS TO PROCEDURE IN COLUMN E BY REFERENCE NUMBER 1, 2, 3, ETC. OR DX CODE

1
2
3
4

23B
EPSDT YES ☐ NO ☐
FAMILY PLANNING YES ☐ NO ☐
PRIOR AUTHORIZATION NO

24. A DATE OF SERVICE FROM TO	B PLACE OF SERVICE	C TOS	D FULLY DESCRIBE PROCEDURES, MEDICAL SERVICES OR SUPPLIES FURNISHED FOR EACH DATE GIVEN. PROCEDURE CODE (IDENTIFY)	(EXPLAIN UNUSUAL SERVICES OR CIRCUMSTANCES)	E DIAGNOSIS CODE	F CHARGES	G DAYS OR UNITS	H LEAVE BLANK

25. SIGNATURE OF PHYSICIAN OR SUPPLIER
(I certify that the statements on the reverse apply to this bill and are made a part hereof.)

SIGNED DATE

26. ACCEPT ASSIGNMENT
(FOR GOVERNMENT CLAIMS ONLY SEE BACK)
YES ☐ ☐ NO

27. TOTAL CHARGE

28. AMOUNT PAID

29. BALANCE DUE

30. YOUR SOCIAL SECURITY NO

31. PHYSICIAN'S OR SUPPLIER'S NAME, ADDRESS, ZIP CODE & I.D. NO
91 001 **EH 19257**

James T. Smith
1234 Sun Valley
Waco, TX 76710

32. YOUR PATIENT'S ACCOUNT NO

33. YOUR EMPLOYER I.D. NO

34. YOUR TELEPHONE NO
817-757-2389

UNIT 4

MEDICAL FORMS

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 4 - Completing Medical Forms

Job 1 - Patient Registration Form

Dr. James Smith at the Smith Medi Center has asked for our help again. All of the jobs in this unit come from the Smith Medi Center. He has several forms he would like for you to produce for him. First, he would like to have a form for new patients to complete, giving basic information about the patient. Design, keyboard, and print out the form, using the information on the following page.

Patient Registration Form
Please Print & Fill Out Completely

Patient's Name _____ Date of Birth ___ Sex ___
Last First

Address _____
City State Zip Code

Telephone # _____ Social Security # _____

Marital Status: Single ( ) Married ( ) Divorced ( ) Widowed ( ) Separated ( )

Bill to _____ Relationship to patient _____
Person responsible for payment

Address _____ City State Zip code
if different from patients address

Employer _____ Occupation _____ How long ___

Employer's address _____ Telephone # _____

Name of spouse _____ Social Security # _____

Employers address _____ Telephone # _____

Name of closest relative (other than spouse) _____

Address _____
City State Zip code

Telephone # _____ Relationship to patient ___

Insurance Information

Insured Person _____ Relationship to patient ___

Insurance Company _____ address _____

City, State, Zip _____ Policy # _____ Group # _____

Medicare # _____ Medicaid # _____

I request that payment of authorized Medicare benefits be made either to me or on my behalf to ~~John~~ Smith, M.D. for any services furnished to me. I authorize any holder of medical or other information about me to release to the Health Care Financing Administration and its agents any information needed to determine these benefits for related services. I understand that I am responsible for any amount not covered by insurance. A photocopy of this authorization and assignment shall be considered as valid as the original and authorization is valid until revoked in writing.

In order to control our cost of billing, we request that payment be made at the time service is rendered. We would rather control our billing costs than be forced to raise our fees.

_____ _____
Responsible Party's signature Date

Job 2 - Authorization for Release of Information

Arrange the following material so that it fits on a sheet of 8 1/2 x 11 inch paper. After the form is printed, the information will be handwritten by the clients on the lines provided; therefore, you will need to leave adequate space for their information. Use your judgment in setting up the form. Print the form on plain paper.

Smith Medi Center

Authorization for Release of Information

Release _____
From _____
_____

Release _____
To _____
_____

Purpose of release: _____

Description of material to be released:
Name of illness: _____
Name of injury: _____
Dates of hospitalization: _____
Records of Dr.: _____

Patient's full name: _____

Date of birth: _____ Date release signed: _____

I consent to disclosure of information relating to my medical status realizing this material may contain information that is protected by federal and state laws.

Patient signature: _____
(or authorized person)

Job 3 - Application for Employment

Dr. Smith has asked you to put the present employment application on disk in order to cut printing costs. While creating the form, you will need to use the following suggestions:

1. Center the name of the clinic and the address using bold print and underlining.

2. Since handwritten information follows each entry, leave adequate space for the information needed.

3. Use bold print for the name, address, date, phone number and column headings.

4. Vertical lines will not be necessary.

5. Double space and single space as shown.

The present employment application is found in on the next two pages.

APPLICATION FOR EMPLOYMENT

Name _____ Date _____
Last First Middle

Address _____
Street City State ZIP

Phone No. _____ Social Security No. _____

In case of emergency, notify: _____

_____

Position desired _____ Salary desired _____

Do you want full-time? _____ Part-time? _____ Temporary? _____ Summer only? _____

EDUCATION	Name and Address	Dates Attended		Date Graduated	Major Area of Study
		From	To		
Elementary					
High School					
College					
Other					

Go over this list carefully. Place an "x" beside every item in which you have had training or experience.

SKILLS
Typing Speed _____
Shorthand Speed _____
Dictaphone _____
Medical Terms _____
Phone _____
Book Appointments _____
Take Cash _____
Billing _____
Collections _____

MACHINES
Adding _____
Calculator _____
Keypunch _____
Mimeograph _____
Ditto _____
Cut Stencils _____

BOOKKEEPING
Posting _____
Peg Board _____
Payroll _____
Payroll Taxes _____
Accounts Receivable _____
Accounts Payable _____
Bank Deposits _____
Bank Reconc. _____
Close Books _____
Trial Balance _____
Statements _____

INSURANCE
Blue Shield _____
Blue Cross _____
Medicare _____
Medicaid _____
Others _____
_____

EMPLOYMENT: List most recent employer first. Use extra sheet if necessary.

Name and Address of Employer	Dates Employed		Position	Reason for Leaving
	From	To		

REFERENCES: Do not list relatives or former employers.

Name	Address	Telephone	How Long Known

Are you currently employed? _____ Date available for work _____

To the best of my knowledge, all of the foregoing information is true and given voluntarily.

I authorize Harborside Medical Clinic to contact my references, including previous employers, to confirm credentials.

_____
Signature

TO BE COMPLETED BY INTERVIEWER

Interviewed by _____ Date interviewed _____

Remarks _____

_____

Date employed _____ Position _____

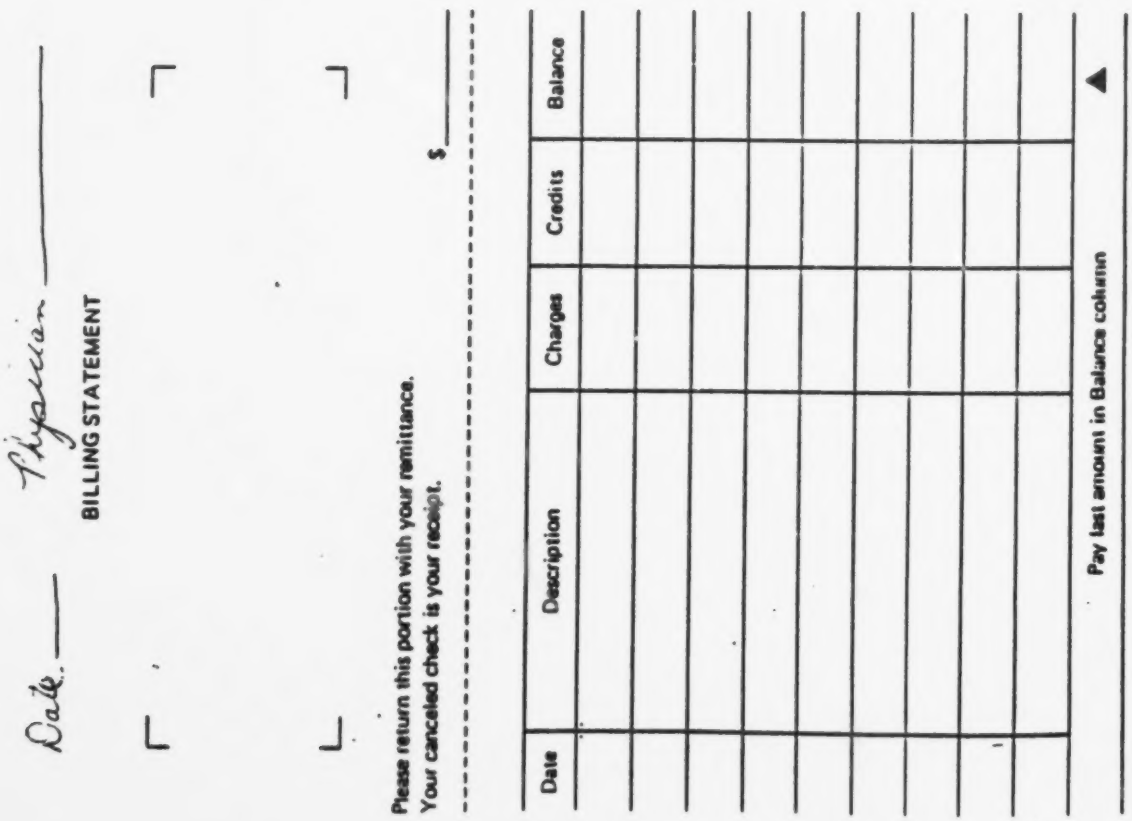
Salary _____

Job 4 - Billing Statement

Dr. Smith also decided to put the billing statements on disk and to print them out as needed. Set up the form according to the following instructions:

1. Use a 50-space line.
2. Put the name and address of the Medi Center at the top of the form.
3. Use bold print on the Date, Physician, and column headings.
4. Use bold print and underline on the "Billing Statement."
5. Use horizontal rulings to block off the address block. This is a chance for you to be creative.
6. Use a black pen to draw in vertical lines after printing.

The form being used now is shown below.



Job 5 - Patient List

Create a form to list the patients to be seen each day. Use the form below as a sample. This document can be used to duplicate the form for the typewriter, or it can be used as a shell to produce the list on the computer. Set the document up on an 8 1/2 x 11 inch piece of paper.

Name
address
city, state Zip Day of the week

Patient List

Date

Hour	Patient	Procedure	Nature of illness

use "copy" to fill the page with lines.

Job 6--Preparing Patient Lists

Prepare a "Patient List" for Dr. Smith so that he may be informed regarding the patients to be seen and the nature of their illnesses. The "Patient List" for next Monday (please supply the date) is shown below. When filling in the form, the procedure will be either a new patient or a re-examination and the name of the test or treatment.

Example - Re-examination or New Patient
Blood sugar EKG

The nature of the illness will be the name of the disease or body part being examined.

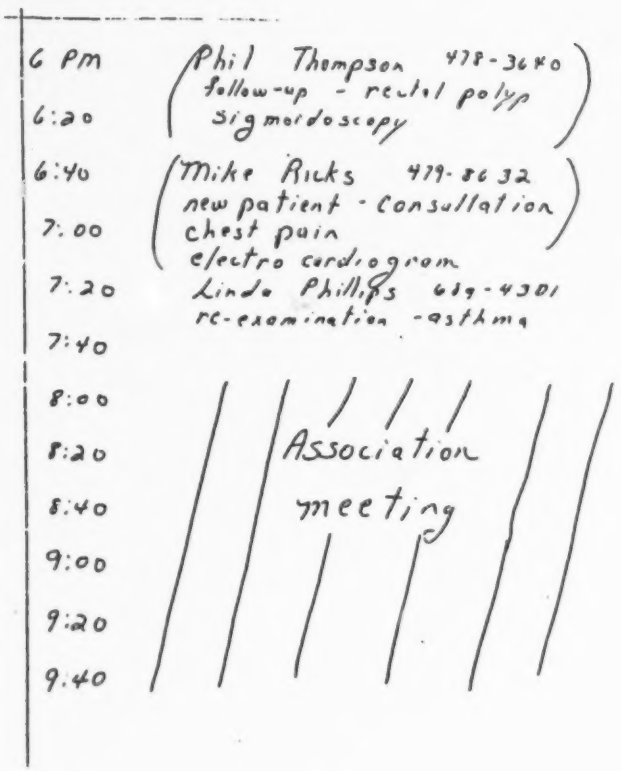
Example - Diabetic or Abdominal pain

Use a typewriter to fill in the patient list.

Next Monday

1 P.M. June Smith 334-6217
Thyroid nodule - re-examination
1:30 Janet Swinson 334-1962
chest pain - new patient
1:50 Sue Granger 687-5213
diabetic - re-examination and blood sugar
2:00 John Johnson 345-0603
hyper tension re-examination
2:20 Manuel Gomez 334-6291
hemorrhoids - new patient
2:40 Porter Jones 846-3372
anemia - re-examination and complete blood count
3:00 // Emergency / / /
3:20 (Shirley Taylor 689-2349
examination - new patient
3:40 heart disease)
4:00 Aaron Williams 345-6701
re-examination - bronchitis

Continued on the next Page.


6 PM
Phil Thompson 478-3640
follow-up - rectal polyp
Sigmoidoscopy
6:20
6:40
Mike Ricks 479-8632
new patient - consultation
chest pain
electro cardiogram
7:00
7:20
Linda Phillips 689-4301
re-examination - asthma
7:40
8:00
8:20
Association
meeting
8:40
9:00
9:20
9:40

Job 7--Patient Lists

Prepare a "Patient List" for Dr. Smith for next Tuesday (Please supply the date) is shown below. Use the same procedure as given in Job 6.

Next Tuesday

9 A.M — No Appts
9:20
9:40 Timothy Swinson 842-6972
otitis media - re-examination
10:00 Barbara Tolbert 842-7922
re-examination - breast Examination
10:20 Jane Barton 842-6836
re-examination - urinary tract infection
10:40 Harold Smith 345-7206
11:00 examination - employment physical
electro cardio gram and
Complete blood count

1 P.M Alma Johnston 345 6878
re-examination abdominal pain
1:20 Kenneth Freeman 345-7911
re-examination - bursitis
1:40 Catch up Time
2:00
2:20 Jim Goodman 968-4034
re-examination - bursitis
2:40

3:00 Frank James 569-4234
re-examination - abdominal pain
3:20 Ray Simpson 345-7967
re-examination - pain in right side
3:40 Yvonne Jones 569-8899
new patient - back pain

Job 8--Insurance Forms

Study the form on the next page which is usually on the back of the insurance forms. This form gives instructions to the patient for completing and signing the form. In addition, information is provided for the patient about the collection and use of these data for Medicare and CHAMPUS programs. The codes to be used in box 24B for indicating the Place of Service are listed below.

Procedure	Procedure Code*	Hypothetical Fee	Classification in Business Analysis Summaries Columns
Office visit, new patient, brief	90000	$20	Office Visits
Office visit, new patient, intermediate	90015	30	Office Visits
Office visit, established patient, brief	90040	20	Office Visits
Office visit, established patient, intermediate	90060	30	Office Visits
Consultation	90605	50	Consultations
Hospital visits, initial, comprehensive	90220	60	Hospital Visits
Subsequent visits, brief	90240	$25 per day	Hospital Visits
Complete blood count	85022	7	Laboratory
Blood sugar	82948	15	Laboratory
Sigmoidoscopy	45300	60	Diagnostic
Electrocardiogram	93000	55	Diagnostic

NOTE: A *new patient* is one being seen by the doctor for the first time; an *established* patient is one who has been seen previously.

All office examinations are *intermediate* unless otherwise indicated.

REFERS TO GOVERNMENT PROGRAMS ONLY

MEDICARE AND CHAMPUS PAYMENTS: A patient's signature requests that payment be made and authorizes release of medical information necessary to pay the claim. If item 9 is completed, the patient's signature authorizes releasing of the information to the insurer or agency shown. In Medicare assigned or CHAMPUS participation cases, the physician agrees to accept the charge determination of the Medicare carrier or CHAMPUS fiscal intermediary as the full charge, and the patient is responsible only for the deductible, coinsurance, and noncovered services. Coinsurance and the deductible are based upon the charge determination of the Medicare carrier or CHAMPUS fiscal intermediary if this is less than the charge submitted. CHAMPUS is not a health insurance program and renders payment for health benefits provided through membership and affiliation with the Uniformed Services. Information on the patient's sponsor should be provided in those items captioned "Insured"; i.e., items 3, 6, 7, 8, 9 and 11.

SIGNATURE OF PHYSICIAN OR SUPPLIER (MEDICARE AND CHAMPUS)

I certify that the services shown on this form were medically indicated and necessary for the health of the patient and were personally rendered by me or were rendered incident to my professional service by my employee under immediate personal supervision, except as otherwise expressly permitted by Medicare or CHAMPUS regulations.

For Services to be considered as 'incident' to a physician's professional service, 1) they must be rendered under the physician's immediate personal supervision by his/her employee, 2) they must be an integral, although incidental part of a covered physician's service, 3) they must be of kinds commonly furnished in physician's offices, and 4) the services of nonphysicians must be included on the physician's bills.

For CHAMPUS claims, I further certify that neither I nor any employee who rendered the services are employees or members of the Uniformed Services (refer to 5 USC 5536).

No Part B Medicare benefits may be paid unless this form is received as required by existing law and regulations (20 CFR 422 510).

NOTICE: Any one who misrepresents or falsifies essential information to receive payment from Federal funds requested by this form may upon conviction be subject to fine and imprisonment under applicable Federal laws.

SIGNATURE OF PHYSICIAN OR SUPPLIER (BLUE SHIELD)

I certify that the services reported on this form were medically necessary for the patient and were performed by me personally or in my presence, or were performed under my supervision by my employee. If the services were performed under my supervision by someone other than my employee, I have described the circumstances in item 24D. I understand that certain types of supervised services may not be covered. I will provide documentation as necessary to establish the validity of the claim.

NOTICE TO PATIENT ABOUT THE COLLECTION AND USE OF MEDICARE AND CHAMPUS INFORMATION

We are authorized by HCFA and CHAMPUS to ask you for information needed in the administration of the Medicare and CHAMPUS programs. Authority to collect information is in section 205(a), 1872 and 1875 of the Social Security Act as amended and 44 USC 3103, 41 CFR 101 et seq and 10 USC 1079 and 1086.

The information we obtain to complete Medicare and CHAMPUS claims is used to identify you and to determine your eligibility. It is also used to decide if the services and supplies you received are covered by Medicare or CHAMPUS and to insure that proper payment is made.

The information may also be given to other providers of services, carriers, intermediaries, medical review boards and other organizations or Federal agencies as necessary to administer the Medicare and CHAMPUS programs. For example, it may be necessary to disclose information about the benefits you have used to a hospital or doctor.

With the one exception discussed below, there are no penalties under Social Security or CHAMPUS law for refusing to supply information. However, failure to furnish information regarding the medical service rendered or the amount charged would prevent payment of Medicare or CHAMPUS claims. Failure to furnish any other information, such as name or claim number, would delay payment of the claim.

It is mandatory that you tell us if you are being treated for a work related injury so we can determine whether worker's compensation will pay for treatment. Section 1877(a) (3) of the Social Security Act provides criminal penalties for withholding this information.

PLACE OF SERVICE CODES:

1 –	(IH)	–	Inpatient Hospital
2 –	(OH)	–	Outpatient Hospital
3 –	(O)	–	Doctor's Office
4 –	(H)	–	Patient's Home
5 –		–	Day Care Facility (PSY)
6 –		–	Night Care Facility – (PSY)
7 –	(NH)	–	Nursing Home
8 –	(SNF)	–	Skilled Nursing Facility
9 –		–	Ambulance
0 –	(OL)	–	Other Locations
A –	(IL)	–	Independent Laboratory
B –		–	Other Medical Surgical Facility
C –	(RTC)	–	Residential Treatment Center
D –	(STF)	–	Specialized Treatment Facility

Job 8 (Continued)--Insurance Forms

Prepare the Medicare claim forms for Jim Goodman, an established patient, covering the fees for his office examination on last Tuesday (please supply the date) and his hospitalization from February 25 to March 3. He was seen each day, including the day of his discharge. Ask your instructor for these forms.

One claim form is to be completed for the hospital visit. The second claim form is to be completed for the fee for Goodman's office examination last Tuesday. The ICD diagnosis number for phlebitis is 451. He had not made a payment.

Use the following patient information sheet to find any information you may need. Also check the information at the beginning of Job 8. Mark box 26 with an "X" in the "Yes" box to show that Dr. Smith is a participating physician in the Medicare program. It is important that this box be checked since Medicare will reject any claim that is not checked "yes" if the physician is a participating physician.

PLEASE PRINT AND FILL OUT COMPLETELY

Patient's Name Goodman, Jim (Last, First) Date of Birth 12/4/23 Sex M

Address 16 Kings Row Hunter, PA 18940-2440 (Street, City, State, Zip Code)

Telephone # 215 961-4034 Social Security # 190-43-6201

Marital Status: Single ( ) Married ( ) Divorced ( ) Widowed (X) Separated ( )

Bill to self Relationship to patient ——

Person responsible for payment

Address same

If different from patient's address City State Zip code

Employer Retired Occupation Welder How long 38

Employer's address NA Telephone # ——

Name of spouse Widowed Social Security # NA

Employer NA Occupation Deceased How long ——

Employer's address NA Telephone # ——

Name of closest relative (other than spouse) James A. Hunt

Address 3789 Wilkins Blvd. Hunter, PA 18940-2830 (Street, City, State, Zip code)

Telephone # 215 966-7383 Relationship to patient father

INSURANCE INFORMATION

Insured Person Jim Goodman Relationship to patient self

Insurance Company Pennsylvania Blue Shield Address 3001 Blue Street

City, State, Zip 65 Trinity Pa 19462 Policy # —— Group # D90200

Medicare # 190-43-6201 A Medicaid # ——

I request that payment of authorized Medicare benefits be made either to me or on my behalf to John Smith, M.D. for any services furnished to me. I authorize any holder of medical or other information about me to release to the Health Care Financing Administration and its agents any information needed to determine these benefits for related services. I understand that I am responsible for any amount not covered by insurance. A photocopy of this authorization and assignment shall be considered as valid as the original and authorization is valid until revoked in writing.

In order to control our cost of billing, we request that payment be made at the time service is rendered. We would rather control our billing costs than be forced to raise our fees.

Jim Goodman March 6, 19—

Responsible party's signature Date

Job 8 (Continued)--Insurance Forms

Prepare a Medicare claim form for John Johnson, who was seen by the doctor on Monday, March 5. John is an established patient. At that time, John signed the claim forms, as required in box 12, to authorize the release of all medical information needed to process the claim and make payment.

Complete the claim form for Medicare. The ICD diagnosis number for hypertension is 401.

PATIENT REGISTRATION FORM

PLEASE PRINT AND FILL OUT COMPLETELY

Patient's Name Johnson, John (Last, First) Date of Birth 1/20/14 Sex M

Address 60 Court Street Daytontown, PA 18901-2513 (City, State, Zip Code)

Telephone # 215 345-0603 Social Security # 198-27-0593

Marital Status: Single ( ) Married ( ) Divorced ( ) Widowed ( ) Separated ( )

Bill to Self (Person responsible for payment) Relationship to patient —

Address Same as Above (If different from patient's address) City State Zip code

Employer Mason TV Sales Occupation Repairman How long 6 yrs.

Employer's address 240 Maple, Jase, PA Telephone # 215 676-3400

Name of spouse Josie Social Security # 252-64-8870

Employer Housewife Occupation — How long —

Employer's address N/A Telephone # N/A

Name of closest relative (other than spouse) Tom Johnson

Address 3909 Eighth Street Ashmea, PA 18914-7010 (City, State, Zip code)

Telephone # 215 663-0870 Relationship to patient father

INSURANCE INFORMATION

Insured Person John Johnson Relationship to patient Self

Insurance Company Hom. Blue Shield 65 Special Address 3001 Blue Strkt

City, State, Zip Nalfolk, WV 46701 Policy # 4278490 Group # A90000

Medicare # I.D. Number 4727S490 Medicaid #

I request that payment of authorized Medicare benefits be made either to me or on my behalf to John Smith, M.D. for any services furnished to me. I authorize any holder of medical or other information about me to release to the Health Care Financing Administration and its agents any information needed to determine these benefits for related services. I understand that I am responsible for any amount not covered by insurance. A photocopy of this authorization and assignment shall be considered as valid as the original and authorization is valid until revoked in writing.

In order to control our cost of billing, we request that payment be made at the time service is rendered. We would rather control our billing costs than be forced to raise our fees.

John Johnson (Responsible party's signature) March 5, 198- (Date)

UNIT 5

LEGAL

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 5--Legal

Mr. James Baker, an established client of ours, has requested that we produce some legal documents for him. He has sent some instructions for typing legal documents. Read these instructions before going on to the documents.

HOW TO TYPE LEGAL PAPERS*

The following information will explain the proper method for preparing documents in a legal office.

Page Format

Regular 8 1/2 x 11 inch paper is used in most legal offices today. To type documents, leave 1-inch margins on the sides and at the bottom. The top margin is usually 1 1/2 inches on the first page and 1 inch on the second and succeeding pages.

Most documents are double spaced and paragraphs are indented 10 spaces. When Roman Numerals are used to number items and are on a line alone, they should be centered and preceded and followed by a double space.

Whenever documents are bound at the top, they are typed with a 2-inch top margin on the first page and a 1 1/2-inch top margin on subsequent pages. A bottom margin of at least 1-inch is always maintained.

Page Numbers

Page numbers should be centered 1/2 inch from the bottom of the page. At least 2 blank lines should separate the page number from the typed material that precedes it. Arabic figures are used for page numbers; they may stand alone or have a hyphen on either side as shown: 2 or -2- .
To prevent the fraudulent insertion of extra pages, the page numbers may be typed as Page 2 of 5. This format is usually used in preparing Wills.

Signature Lines

Signature lines for the names of the parties are provided at the end of legal documents. To prevent the signatures from being attached to some other document, they should never stand alone on a page. At least one or more lines of the typed document must appear on the same page. The typist uses the underscore key for typing the lines for the signatures of the principal(s) and for the witness(es). Generally, the signature line of the principal begins 3 blank lines below the body of the document, two or three spaces to the right of the center of the page, and extending to the right margin.

---

* Written by Jamie Stanford, Instructor, McLennan Community College, Waco, TX.

Signature Lines (continued)

The signature lines for witnesses begin at the left margin and extend almost to the center of the page.

If space permits, there should be 3 blank lines between each signature line. If space on the page is limited, there must be at least a double space between each signature line and between the body of the document and the first signature line.

In legal documents the name of the person signing (the principal) should be typed directly below the line. (Type the signature line with the underscore key, then single space and center the name under the line.)

When a corporation is a party in the legal document, the corporate name is typed in solid caps a double space above the signature line. Leave 3 blank lines to type the signature line in the proper position on the page, but precede the line with the word "By:" Then type the title of the corporate officer who signs the document under the signature line. An example is below:

ABC COMPANY

By: _____
Vice President

Caption

The part of a legal document that appears above the body is called the caption. Each court document must contain the caption, and it remains unchanged during the course of the legal action. There are specific regulations governing the information that must appear in the caption, but the style used may vary somewhat. A sample caption is on the next page.

If the document is not a court document, such as a contract, then no caption is used. Just center the name of the document over the body--like an unbound manuscript.

SAMPLE CAPTION

* IN THE 74TH JUDICIAL
* DISTRICT COURT OF
* MCLENNAN COUNTY, TEXAS
*

****

****

CHANGE FORMAT TO DOUBLE SPACING AND BEGIN TYPING TEXT HERE.

YOU WILL CREATE A CAPTION JUST LIKE THIS ONE TO USE ON ALL YOUR DOCUMENTS. NAME IT CAPTION.

DO NOT TYPE SAMPLE CAPTION ON YOURS. LEAVE ROOM TO ADD THE PAGE NUMBER WHICH SHOULD BE CENTERED ON LINE 10.

WHENEVER YOU NEED TO CREATE A COURT DOCUMENT THAT REQUIRES THAT YOU GET THIS CAPTION, YOU WILL:

1. CREATE THE COURT DOCUMENT, DO NOT TYPE ANYTHING, BUT SET THE MARGINS AND TABS (BE SURE TO SET A CENTER TAB)
2. GO TO THE TYPING AREA
3. USE GET (F6) TO RECALL THE CAPTION
4. THEN FILL IN THE NAMES, DOCUMENT NAME, THEN PROCEED WITH THE BODY OF THE DOCUMENT

Notarizing Documents

The Notary's Affidavit can take on various forms depending on whether or not the document is a court document or not. The jurat (notary statement) may be double spaced or single spaced--depending on the amount of space available on the paper. An example is below:

SUBSCRIBED AND SWORN before me on this day of , 19 .

_____
Notary Public

Miscellaneous Typing Rules for Legal Documents

1. The decimal and zeros are usually included in numbers.
2. Titles are centered in all caps.
3. Use all capitals for expressions such as WHEREAS, IN WITNESS, RESOLVED, WHEREFORE.
4. Avoid hyphenating words at the end of the last line on a page.
5. When typing Wills, try to avoid ending a paragraph at the bottom of a page.
6. Sums of money are written out and then repeated as figures in parentheses on contracts, wills, and deeds. In other documents figures only is acceptable.
7. The names of legal documents should be capitalized when they appear within the body of a document, i.e., Original Petition, Interrogatories, etc.
8. The names of individuals and businesses are to be typed in all caps.
9. Verifications are begun three to four carrier returns below the last line of the document--on the same page.
10. Use "RE:" to introduce all subject lines in correspondence.

HOW TO TYPE PROPERTY DESCRIPTIONS

1. Single space, with a double space between paragraphs; double indent.

2. Do not abbreviate Street, Avenue, Road, Boulevard.

3. Write the words "North, Northeast, South, West, Southwest," etc. The words westerly, northerly, etc. should be in small letters.

4. Capitalize quarter, township, section, and range, and the name or number of a prime meridian.

5. Metes (meaning measurements) and bounds (meaning boundaries) descriptions give exact measurements and boundaries of a parcel of real estate. The description included in this lease is a metes and bounds description. The symbols used to indicate exact direction are in degrees (°), minutes (') and seconds ("). Example: south 20°33'45". It would be read:
South 32 degrees, 4 minutes, 40 seconds. Keep metes and bounds together--do not separate at the end of a line.

6. Write distances as follows: 133.29 feet

7. When several courses and distances are given in succession, introduced by the word "Thence," that word "Thence" begins a new paragraph. All such paragraphs will end with semicolons except the very last one which ends with a period.

8. Type the first word in each paragraph in all caps.

SEE NEXT PAGE FOR A SAMPLE:

SAMPLE PROPERTY DESCRIPTION

THAT portion of the Barnett Tract, San Hosea subdivided for the Lina Land Association, in the county of Revos, state of Texas, as per map recorded in Book 2 Page 307 and in Book 38 Page 20 of Miscellaneous Records of said County, described as follows:

BEGINNING at a point in the center line of the San Hosea Road, also called the Hills Road and Second Street, that is South 42°24'50" West, 429.5 feet from the most Westerly corner of Tract No. 4783, as per map recorded in Book 39 Pages 20 and 21 of Maps, in the office of the County Recorder of said County;

THENCE North 22°29'50" East, 294.77 feet;

THENCE South 35°33'23" East, 135.34 feet;

THENCE South 34°34'67" West, 135.23 feet to a point in the center line of said San Hosea Road;

THENCE North 36°43'31" West along said center line, 136.79 feet, more or less, to the point of beginning, more commonly known as 2401 Hills Road, Hosea, Texas.

LAST WILL AND TESTAMENT OF

JAMES T. DERRICK

I, JAMES T. DERRICK, city of Casterville, state of Texas, being of sound mind and disposing memory, do make, publish and declare this to be my Last Will and Testament, and hereby revoke any and all former wills and codicils to wills by me made.

I

I hereby direct my executors hereinafter named, to pay all my just debts and funeral expenses as soon after my demise as can be lawfully and conveniently done.

II

I give and devise my farm located just outside and to the west of Centerville, to my son CHARLES and to his heirs and assigns forever.

III

I give and bequeath to my daughter HANNIE fifty (50) shares of common stock of UNITED SECURITIES, INC.

IV

I give and bequeath the following sums of money to the following persons:

a. The sum of Seven Hundred Fifty Dollars ($750.00) to JIM SMITH of Georgetown, Texas;

b. The sum of One Thousand Dollars ($1,000.00) to

EDNA MILLER of Evansville, Texas.

V

I give and bequeath to the SIMPSONS LOAN AND TRUST COMPANY, a corporation, organized under the laws of. . . . .

IN WITNESS WHEREOF, I have signed my name to this Last Will and Testament this fifth day of June, 19XX.

_____
JAMES T. DERRICK

The foregoing instrument, consisting of two pages, including this page, was at the date thereof by the said JAMES T. DERRICK signed, sealed, published and declared to be his Last Will and Testament in the presence of us, who, at his request, in his presence and in the presence of each other, have subscribed our names as attesting witnesses thereto.

_____ Address _____

_____ Address _____

_____ Address _____

You must carry at least one line of a paragraph to the next page to prevent fraud and a will.

CASE NUMBER

LUIS JAMES	*	IN THE 74TH JUDICIAL
VS.	*	DISTRICT COURT OF
GUNTHER M. BART, CYNTHIA JOHNSON, AND DOES 1 - X, INCLUSIVE	*	MCLENNAN COUNTY, TEXAS

****

INTERROGATORIES TO DEFENDANT

****

TO DEFENDANT, GUNTHER M. BART, AND TO HIS ATTORNEY OF RECORD:

Pursuant to Sections 2018 and 2030 of the Code of Civil Procedure, plaintiff requests defendant, GUNTHER M. BART GARFIELD to fully answer each and every one of the following interrogatories under oath:

15. Identify with particularity each and every sketch, diagram, and/or photograph that you have knowledge of concerning either the scene, an object, or individual involved in the subject accident.

16. Describe the general mechanical condition which the motor vehicle you were operating was in at the time of the accident.

17. Describe the general damage done to your vehicle and the cost of repairs, if known.

18. If you were charged with violating any provision of the California Vehicle Code with respect to the subject accident, please state for each:

a. The provision you were accused of violating;

b. Your plea to the charge; and

c. The date and place said plea was made.

19. If you claim the plaintiff herein was in any manner negligent at or about the time of the accident, please state:

a. Each and every fact upon which you base your claim that plaintiff was negligent; and

b. The names, addresses, and telephone numbers of all witnesses who would support your allegation that plaintiff herein was negligent at the time of the accident.

20. If you claim that any party (other than plaintiff) was in any manner negligent at or about the time of the accident, please state:

a. The name, address, and telephone number of each party;

b. Each and every fact upon which you base your claim that said party was negligent; and

c. The names, addresses, and telephone numbers of all witnesses who would support your allegation that said

party was negligent at the time of the accident.

Dated: (Current Date)

By_____
Joana Fields
Attorney for Plaintiff

You may carry one line of a paragraph to the next page on legal documents

5

The following will help you the information on a legal back properly:

1. A legal back has 54 vertical line spaces.

2. Count the lines to be used to type this particular endorsement.

   Sixteen lines will be used for this example. This includes the parties to the agreement with the spaces between, the name of the document with spaces and horizatonal rulings, and the law firm's name and address.

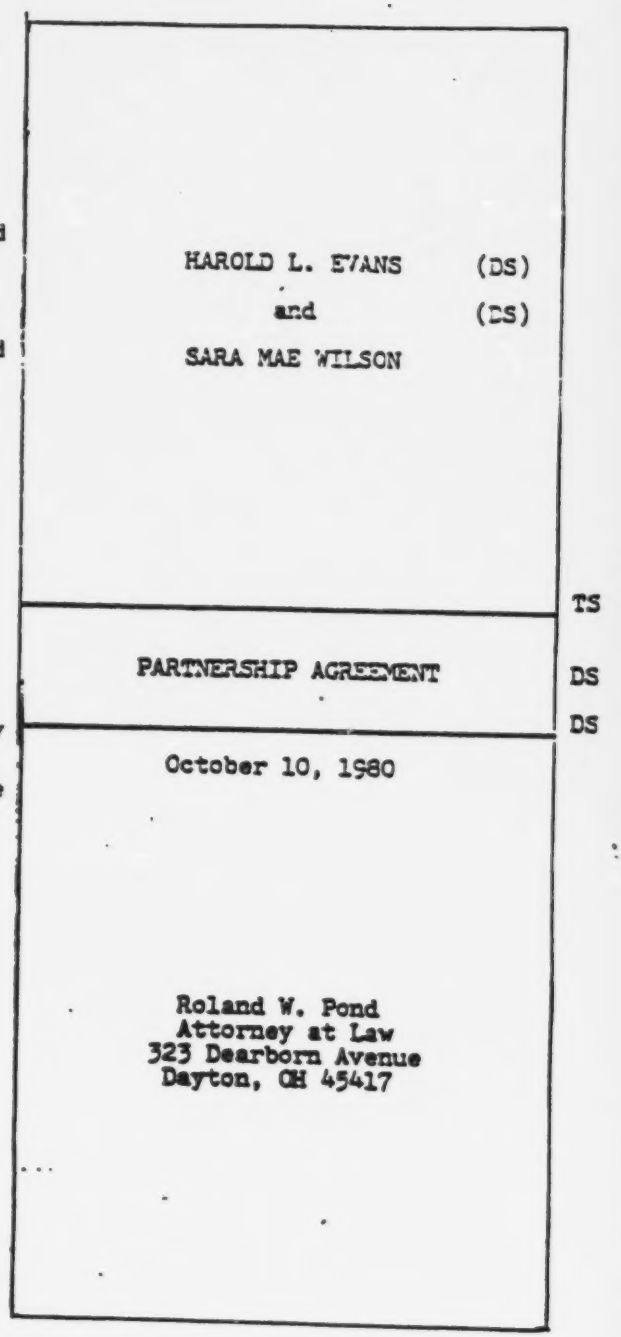
3. Subtract the lines used from 54.

4. Then divide that answer by 4 (the number of blank areas that will need to be fairly equal).

EXAMPLE:

$$\begin{array}{r} 54 \\ -16 \\ \hline 4\ \overline{)\ 38} \end{array} = 9\ 1/2$$

TYPING ON LINE 10 AND LEAVING 9 BLANK LINES BETWEEN THE PARTS.



Job 1--Shell for a Legal Document

Create a shell for the legal caption found in the reading material. This shell will be used in the documents you create for Mr. Baker. You will use GET to call it into your document.

Job 2--Will

On the following page is "The Last Will and Testament" for Taylor Thompson that you will need to keyboard. Type a legal back on the typewriter according to the directions in the reading material.

Last Will and Testament of Taylor Thompson

I, Taylor Thompson, a resident of the City of Gatesville, County of Gatesville, State of Texas, and residing at 2469 Willow Lane, being over the age of twenty-one years and of sound and disposing mind and memory, and not acting under duress, menace, fraud, or undue influence of any person whomsoever, do make, publish, and declare this my last will and testament, in the manner following, to wit: I

~~FIRST.~~ I direct that all my debts, including my funeral expenses, expense of my last illness, and expenses of the administration of my estate be paid by my executor, hereinafter named, out of the first moneys coming into his hands and available thereof. II

~~SECOND.~~ I hereby declare that I am married; that my wife's name is Allene Thompson; and that I have two children, a son, Jerrod F. Thompson, and a daughter, Brandy Thompson.

~~THIRD.~~ I hereby give, devise, and bequeath to my son, Jerrod F. Thompson, my fourteen-karet gold pocket watch and the matching fourteen-karet gold watch chain, both of which originally belonged to my father, John Thompson. III

~~FOURTH.~~ With the exception of the above-

Will- Page 2

stated specific devise, I hereby give, devise, and bequeath all the rest residue of my property, after payment of the debts and expenses provided for in paragraph 1 here of whether such property be real, personal, or mixed, or wheresoever kind or character and wheresoever situated, to my wife Allene.

~~FIFTH~~. I hereby nominate and appoint THE BANK OF GATESVILLE the executor of this, my last will and testament, along with my wife, Allene, to serve as CO-EXECUTOR

LASTLY, I hereby revoke all former wills and codicils to wills heretofore by me made.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this 3rd day of May, 19--

_____ (SEAL)

The foregoing instrument, consisting of two pages, was at the date hereof, by Taylor Thompson, signed, sealed, and published and declared to be his Last Will and Testament, in the presence of us, who, at his request and in his presence and in the presence of each other, have signed our names as witnesses hereto.

_____ address _____

_____ address _____

_____ address _____

Job 3--Land Description

Type "Exhibit A" using the instructions for typing land descriptions found in Mr. Baker's instructions.

Exhibit A

All that tract or parcel of land in Lot of Land Number Four Hundred and Thirty-Nine (439) particularly described as follows:

Beginning at the intersection of Texas Public Highway Number Three Hundred and Twenty-Four (324) with the East original Lot Number One Hundred and Seventy-Five (175);

Thence North 42°27'40" East, 809 feet to starting point;

Thence East 32°29'56" South, 437 feet;

Thence South 42°67'50" West, 345 feet,

Thence West 32°40'72" North, 809 feet to Starting Point.

Continued on next page

Being Lot Seven (7) of the re-subdivision of the Grant Subdivision according to Plat and Survey made by J. C. Hawley, Surveyor, on June 12, 19--, and recorded in the Office of the Clerk of Superior Court, in Plat Book Three (3) of Page thirty-four (34).

Job 4--Interrogatories

On the next page is an interrogatory. Keyboard the interrogatory according to instructions in the reading material. This document will be used in court, therefore, you will need to use "Get" to include the caption in the document. Mr. Baker's client, Nathan Sharp, is the defendant. The title in the caption should be INTERROGATORIES TO PLAINTIFF.

Interrogatories To Be Propounded

To Jonathan J. Stevens, Plaintiff, and

To His attorney of Record

Pursuant to the Provisions of Federal Rules of Civil Procedure, rule 33, to answer fully under oath the following questions within 20 days.

1. Give your name, age, occupation, and address.

2 Specify your length of employment with Grant Mfg. Co.

3. List the type positions you have held with the above-mentioned company.

4. List any safety measures which have been suggested to you for safety devices relating to your job.

5. Describe fully the safety precautions you had followed on the day of the accident, June 14, 19--.

6. If you have used any of the safety devices, please list and describe.

7. List any physicians who have treated you with regard to this injury and give their addresses.

8. Describe in detail the nature and extent of your injury.
9. State the number and date of hospitalizations and admissions to Clinics at this company.

10. List any dates you remained at home as a result of the injury.
11. List the total amount of earnings lost by your incapacity to work as a result of the injury.
12. Describe in detail the moneys you have spent as a result of the alleged negligence of the defendant.
13 List all the ways which you believe the defendant to have been negligent
14. Describe in detail how the accident occurred and describe the machine you were operating at the time
15. Describe fully your physicians' prognosis concerning your injury.

_____

attorney for Defendant

UNIT 6

MISCELLANEOUS DOCUMENTS

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 6--Miscellaneous Jobs

Job 1--Electric Typewriter

Ballinger Marketing Service has brought in three jobs to be done. However, on this day, the computers are down and you must resort to the typewriter.

Job 1 (on the next page) is a Comparison of Computers that is to be done lengthwise on the paper. You will need to decide on the space between columns. The horizontal lines should be made on the typewriter. These lines should be placed exactly as shown on the copy on the next page. You will need to draw the vertical lines with a black pen after taking it out of the machine or you may use the notch on the cardholder to hold your pen while you turn the platen to make the vertical lines.

Comparison of Computers
Based on 1986 Survey of Businesses

Computer Brand	Peripheral Information: Disk Drive 1	Disk Drive 2	Screen: Monocrome	Screen: Color	Keyboard: Querty	Keyboard: Dvorak	Programable Function Keys	Expandable to 640 K
DEC	yes	yes	yes	yes	yes	no	yes	yes
IBM	yes	yes	yes	yes	yes	no	yes	yes
Apple	yes	yes	yes	no	yes	yes	no	no
Phillips	yes	yes	yes	yes	yes	no	yes	yes
Leading Edge	yes	yes	yes	yes	yes	no	yes	yes

Full Sheet - Long edge up
DS
Boxed table with open sides
centered headings

Job 2--Table

Set up the table entitled "Pricing Information for Iron Piping" (on the next page) lengthwise on the page. You will need to decide on the space between columns. You will need to insert vertical and horizontal lines as shown. Remember to use a black pen to draw the vertical lines.

Full sheet, long edge up
DS
Boxed format, open sides
Centered headings

Pricing Information for Iron Piping *

2 X 20		2 X 21		2 X 23	
Catalog Number	Box of 5	Catalog Number	Box of 5	Catalog Number	Box of
056347	$10.95	74236-21	$12.95	4629-321	$14.95
056348	$10.95	74237-22	12.95	4630-322	$14.95
056349	$10.95	74238-23	12.95	4631-323	14.95
056350	$10.95	74239-24	12.95	4632-324	14.9
056351	10.95	74240-25	12.95	4633-325	14.9

* Manufactured by General Corporation

Job 3--Paragraph Alignment

The job "Office Automation Question and Answers" (on the next page) would have been done as paragraph alignment on the computer. However, you will use tabs on the typewriter. Use 1-inch side margins, and you decide on the space between the columns.

Office Automation Questions and Answers

1. Does every office need a typewriter?

No. An office does not need a typewriter if this work can be produced on a computer or word processor. However, if forms are used in the office, a typewriter is a must.

2. Can an office produce work efficiently with only one or two printers?

Yes. Since 75% to 80% percent of the production time of a document is spent in keyboarding, an office can operate quite efficiently by sharing printers.

3. Is it important to choose furniture carefully?

Certainly. Today furniture is being produced with the human body in mind. Look for ergonomic furniture that will fit the employee's body and the task to be performed

Continued on the next page

4. Will reprographics save money for a company?

Yes. Duplicating document for the office has become an important function. By purchasing or leasing copy machines, the company will save money in the long run.

5. What is the main purpose of micrographics?

Micrographics allow the company to cut down on storage space. One small box of microfilm can eliminate 5 to 7 filing cabinets. Also, the court system is now recognizing copies made from micrographics as admissible evidence.

Continued on the next page

6. Can facsimile and telecommunications speed document delivery?

Yes. A facsimile machine can now send documents in a matter of seconds. It can send typewritten documents as well as handwriting and graphics. Communicating computers can send information from one location to another in seconds. The information can either be printed or saved to disk or mainframe.

Job 4--News Release

Susan has dictated a news release announcing your joining the firm. The instructions for the news release are dictated with the release. Ask you instructor for Unit 6, Cassette Side 1.

Job 5--Paragraph Alignment

John's Print Shop has sent over a cassette with a paragraph alignment of definitions. You will type the job according to the dictated instructions. Ask your instructor for Unit 6, Cassette, Side 1.

You will need to set up your first column size as 16 and your second column size for no more than 47. Use column layout to set up this paragraph alignment. If you do not remember how to do paragraph alignment, consult a reference guide for your word processing package.

Job 6--Tabulation

John's Print Shop had two jobs on the cassette. This job is a tabulated job. You will type the job according to the dictated instructions. Ask your instructor for Unit 6 Cassette side 2. The columns headings will look like the following example:

	LAST YEAR		THIS YEAR	
SALESPERSON	NUMBER	AMOUNT	NUMBER	AMOUNT

Job 7--Boilerplate

Turner Travel Agency has requested that we do a boilerplate for them. Turn to page 139 in WORD/INFORMATION PROCESSING--EXERCISES, APPLICATIONS, AND PROCEDURES and do the problem found on pp. 139-143. Print the letters and envelopes.

Job 8--Boilerplate

Turner Travel Agency has requested that we do another boilerplate for them. Turn to page 144 in WORD/INFORMATION PROCESSING--EXERCISES, APPLICATIONS, AND PROCEDURES and do the problem found on pp. 144-148. Print the letters and envelopes.

Job 9--Merge

Smith Medi Center has requested that we do a mailing for them. Turn to page 159 in WORD/INFORMATION PROCESSING--EXERCISES, APPLICATIONS, AND PROCEDURES and do the problem found on pp. 159-160. Print the letters and envelopes.

Job 10--Itinerary

Susan is planning to attend a seminar on Integrated Information Processing. Turn to page 79 in WORD/INFORMATION PROCESSING--EXERCISES, APPLICATIONS, AND PROCEDURES. However, the dates for the seminar have been changed to next Thursday and Friday. Consult your calendar for the dates; and when keyboarding the itinerary, make the dates change. Change the name from Agenda to Itinerary.

Susan has asked you to put this on her calendar. Please list each item at the appropriate time.

Job 11--News Release

Susan has dictated a news release for you to keyboard. Instructions for the news release are the same as those in Job 4. Ask your instructor for Unit 6, Cassette Side 2.

Job 12--Composing a Letter

After you have printed out the news release, use the information in it to compose a mailing to some of our clients announcing our consulting service. The tone of the letter should be a cheerful sales approach. Be sure to tell the clients the many things you can do for them. The letter must be two pages in length.

Have your instructor read over the letter before you do the merge. Make any revision that are necessary.

Send the letter to Tom Attaway, Stewart Ballinger, Terry Stafford, and Dr. James Smith. Merge the letter, printing out letters and envelopes.

UNIT 7

LEARNING NEW SOFTWARE

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 7--Learning New Software

Wylie Real Estate needs someone to come to the office to work on a report they need keyboarded and printed. Secretaries Incorporated is charging them $15 per hour. The word processing software they are using is Word Perfect. You will need to get the manual and read through it and work some examples that are in the manual. Then you will need to key in the report of pages 88-89 of WORD/INFORMATION PROCESSING: EXERCISES, APPLICATIONS, AND PROCEDURES.

The following changes will be made in the directions for the report.

1. Use 1-inch margins.
2. Double space.
3. Indent the paragraphs.

UNIT 8

DICTATION

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 8 - Dictation

You will need to secure a recorder with a microphone and the book, HOW TO DICTATE by Adele Schrag.

Pages to Read	Activity
pp. 1-4	"Introduction" and "About This Module"
pp. 5-14	Learning Experience 1--Activity 1 - Communications
pp. 43-45	Learning Experience 3--Activity 1 - Speak Clearly and Distinctly After reading the material, do the "Self Assessment 1" on p. 45. Dictate all the material as indicated on pages 45-46. After dictating this material, listen to your tape; and on a separate sheet of paper assess yourself according to the voice assessment on P. 47.
pp. 49-54	Learning Experience 3--Activity 2 - Provide Complete Instructions After reading this information, dictate the "Example of Dictation Using Guidelines" at the bottom of page 54. Do "Self Assessment 2" on page 55. After you have read the instructions and the "story," outline what you should say on a blank sheet of paper. Then dictate. Check the FEEDBACK on p. 58 to assess how well you did.
pp. 59-62	Learning Experience 4--Activity 1--Plan Your Correspondence

After reading this information, do "Self Assessment 1" on p. 63. You will do an outline for Letter 1 only found on p. 35. Use the "Plan Your Correspondence Worksheet" found at the end of this unit to make your notes.

After completing the worksheet, check your answers with the "Feedback" on p. 64.

pp. 67-69 Learning Experience 4--Activity 2 - Plan Your Dictation Session

pp. 70-72 Learning Experience 4--Activity 3 - Check Your Words

pp. 75-76 Read "Dictator Assessment"

Job 1--Letter to Dictate

Answer Letter 2 on p. 36. You will be in Los Angeles on October 20 and 21. Decide on an alternative action to propose. Your calendar is free on October 17 or November 1 (November 15-16)you will be in St. Louis.

Use one of the "worksheets" in the unit to prepare for dictation.

Please include the following in your dictation:

1. Do step 1 on the worksheet, filling in those questions which apply.
2. Do step 2 which gives all the beginning instructions.
3. Do step 3 which gives you an outlines for what you want to say in each paragraph. Only use key words--no sentences.
4. Do step 4 which gives the ending instructions.
5. Let your instructor review the worksheet and initial it.
6. Dictate the letter with only this sheet of paper before you. Turn in your cassette tape and the worksheet for grading.

PLAN YOUR CORRESPONDENCE

Step 1: Decide on the Key Ideas for the Letter

Who?

What?

How?

When?

Where?

End?

Step 2: Give Instructions for the Beginning of the Letter

Step 3: Outline the Key Ideas

Paragraph 1

Paragraph 2

Paragraph 3

Paragraph 4

Paragraph 5

Step 4: Instructions at the End of the Letter

PLAN YOUR CORRESPONDENCE

Step 1: Decide on the Key Ideas for the Letter

Who?

What?

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Step 3: Outline the Key Ideas

Paragraph 1

Paragraph 2

Paragraph 3

Paragraph 4

Paragraph 5

Step 4: Instructions at the End of the Letter

UNIT 9

PRINTING OUT DATA BASE MANAGEMENT AND SPREADSHEET FILES

OFT 2402: Advanced Information Processing

STUDENT'S LABORATORY GUIDE

Unit 9--Printing Out Database Management and Spreadsheet Files

Job 1--Updating the Employee File

1. Change your title on the employee file to Consultant.

2. A new person was hired to take your place--add her to the Employee file.

   Janet Grant
   4573 Dear Point
   Waco, TX 76720
   753-2390
   SS# 435-90-6489
   Date of Employment -- Current date

Job 2--Print Out Client and Employee Files

Print the changes that have been made in the Client and Employee files using dBase 3. Be sure the print all the forms as requested in Unit 1.

Job 3--Print Out Secretaries Incorporated's Budget

Print out the Budget for Secretaries Incorporated showing the total income you generated for the company.

Job 4--Print Out Clients' Bills

Print out all the bills showing the final balances.

UNIT 10

OFFICE AUTOMATION PROJECT

OFT 2402: Advanced Information Processing

STUDENT' LABORATORY GUIDE

Unit 10--Consultation Report

Ask your instructor for the handout describing the company you will be updating. Read the handout carefully to understand the makeup of the company and the needs of the company. You will use these handouts as a starting place for automating the company.

The Consultation Report will be broken down into individual assignments to be turned in for your instructor to evaluate. At the end of the report, you will pull all of the parts together to make one report to be submitted to the head of your company.

Part 1 - Trip to visit your company

Plan a trip to your company to tour the company and to talk with the head of the company in order to know its present situation and to plan for future changes. You will be leaving tomorrow.

1. Set up a calendar for yourself showing that you will leave the next day at the time your flight is planned to leave.

2. Print out a copy of the calendar.

3. Compose at the computer a list of departments and people with whom you will want to talk.

4. Compose at the computer a list of questions you want to ask the head of the company regarding the changes he wants made.

Part 2 - Calendar

While you were visiting with the company, the president schedules a meeting with you one week from the day of your visit. Place this appointment on your calendar. He plans to spend the entire day with you; therefore you will need to indicate on your calendar that the day is reserved for the head of your company. You will need to decide upon a nice restaurant for lunch. Place the name of the restaurant on your calendar. Print the calendar for that day.

Part 3 - Assessing Current Equipment

Assess the current equipment used by the company. Compose a paragraph describing the equipment being used by the company and who is using this equipment. You will need to set up a document on DisplayWrite 4 that you can add these parts to in order to put the individual parts together as one report to be presented to the head of the company. However, each part will be created separately and handed in to your instructor.

Part 4 - Work Flow, Documents, Centralized or Decentralized

1. Reread your assignment sheet to determine the current work flow of documents.

2. Compose a paragraph describing the current work flow (Work flow is the direction or people the documents goes to from the originator to the finished product to be mailed. At this point, you may need to use your imagination since the company description is not complete.)

3. Compose a paragraph to summarize the types of documents used by the entire company. This summary will be important in determining the need for a work processing center and the types of documents that should be produced by the center. On the other hand, this summary may lead you to the decision that a word processing center is not needed, but a decentralized method of document production is needed. Whichever the case, you must summarize the documents for personnel evaluation and for equipment determinations.

4. Once you have a summary of the documents, decide the best way to produce these documents--decide whether the word processing will be centralized, decentralized, or a hybrid. Your choices may include the following:

    1. On a word processor or a Personal Computer by a specialist secretary in a word processing center.

    2. On a word processor or a Personal Computer by a generalist secretary in a department.

    3. On a word processor or a Personal Computer by a specialist secretary in a work cluster or a satellite word processing center.

5. Compose a paragraph describing the method of document production (centralized, decentralized, or hybrid) you have chosen. Be sure to include how this decision will affect document flow. Indicate what documents will be sent to the word processing center or individual depart-

ments. You must be very specific about which documents will be created where in order for the work flow to be equal between generalist secretaries and specialist secretaries. Possibly the best way to show the departments to produce certain documents is with a tabulation showing the different departments and where they should send the documents and reports they produce.

6. Print and submit these two paragraphs and the tabulation to your instructor for evaluation.

Part 4 - Reorganizing Personnel

Make decisions about office personnel.

1. Assess the current positions and the duties of these positions. Determine what positions can be omitted and what positions can be combined to form new positions.

2. Reorganize the personnel.

3. Create a new organizational chart showing all the changes in personnel you have made. You may use a typewriter or DisplayWrite 4 to create this organizational chart. When the head of the company comes for his scheduled visit, you will need to have the chart ready for his approval.

4. Print and submit the organizational chart to your instructor for evaluation. Later this chart will be inserted into the final report going to the head of the company.

Part 5 - Dictation Equipment

Make decisions regarding document origination.

1. Since all documents are handwritten, which is the slowest method of origination, you need to decide upon a better method. Your best option is dictation. Determine how many transcribers you will need for the secretarial staff.

2. Evaluate the originators, and determine how many recording units they will need. Decide whether they need desk-top or portable equipment.

3. Create a spreadsheet with Lotus 1-2-3 showing the following features of transcribers (This list is a sample and is not complete. You may add more features.):

    1. Electronic Queing
    2. Document length
    3. Scanning
    4. Cost

You will need to choose two or three different transcribers with these characteristics to compare on the spreadsheet. After choosing these transcribers, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

Does not have the feature = 0
Poor quality = 1
Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which transcriber will be best for the company. Then create a graph to represent these numbers. Print and submit the spreadsheet to your instructor for evaluation.

Using DisplayWrite 4, prepare a paragraph which describes the process you used to evaluate the transcribers and enter the graph created with Lotus under the paragraph. Later, this paragraph will be added to the report to the head of the company. Print and submit the paragraph and the graph to your instructor for evaluation.

4. Create a spreadsheet with Lotus 1 2 3 showing the following features of desk-top recorders (This list is a sample and is not complete. You may add more features.):

1. Electronic Queing
2. Document length
3. Scanning
4. Cost

You will need to choose two or three different desk-top recorders with these characteristics to compare on the spreadsheet. After choosing these recorders, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

Does not have the feature = 0
Poor quality = 1
Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to

determine which recorder will be best for the company. Then create a graph to represent these numbers. Print and submit the spreadsheet to your instructor for evaluation.

Using DisplayWrite 4, prepare a paragraph which describes the process you used to evaluate the transcribers and enter the graph created with Lotus under the paragraph. Later, this paragraph will be added to the report to the head of the company. Print and submit the paragraph and the graph to your instructor for evaluation.

5. Create a spreadsheet with Lotus 1 2 3 showing the following features of portable recorders (This list is a sample and is not complete. You may add for features.):

   1. Electronic Queing
   2. Document length
   3. Scanning
   4. Cost

   You will need to choose two or three different portable recorders with these characteristics to compare on the spreadsheet. After choosing these recorders, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

   Does not have the feature = 0
   Poor quality = 1
   Fair quality = 2
   Good quality = 3
   Excellent quality = 4

   After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which recorder will be best for the company. Then create a graph to represent the numbers. Print and submit the spreadsheet to your instructor for evaluation.

   Using DisplayWrite 4, prepare a paragraph which describes the process you used to evaluate the transcribers and enter the graph created with Lotus under the paragraph. Later, this paragraph will be added to the report to the head of the company. Print and submit the paragraph and the graph to you instructor for evaluation.

6. Decide whether you will be using standard, micro, mini, or pica cassettes or random access storage for the equipment you have chosen.

7. A general paragraph needs to be composed to tell the head of the company how many of each type of transcriber or recorder needs to be purchased and the total amount of the purchase. You will also need to include the type of tapes you plan to use. Then you will need to tell which departments get which kind of transcriber or recorder. This need to be a very detailed paragraph giving department names which are receiving what kind of transcriber or recorder. Print and submit this paragraph to your instructor for evaluation.

8. Once these decisions have been made, you need to decide how these transcribers will affect the work flow. Add this to your work flow section of the report. Print and submit this revised paragraph to your instructor for evaluation.

Part 6 - Choosing Word Processing Packages

Now that you have summarized the documents needed by your company, you need to make decisions about how those documents will be produced.

1. Make a list of all of the functions needed on a word processing software package to produce the documents used by your company. This list should include formatting functions (column alignment, copy, delete, underlining, line adjustment, etc.), decimal tabs, math capabilities, mail merge, boiler plating, and file merging between different software packages.

2. After looking through the literature provided by your instructor, create a spreadsheet with Lotus 1 2 3 showing the following features of three or four word processing software packages (This list is a sample and is not complete. Feel free to add to it.):

    1. Function Keys
    2. Formatting Features
    3. Decimal Tabs
    4. Math Functions
    5. Mail Merge
    6. Boiler Plating
    7. Files Merging

    You will need to choose three or four different word processing software packages with these characteristics to compare on the spreadsheet. After choosing these packages, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

Does not have the feature = 0
Poor quality = 1
Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which word processing package will be best for the company. Then create a graph to represent these numbers. Printe and submit the spreadsheet to your instructor for evaluation.

Using DisplayWrite 4, prepare a paragraph which describes the process you used to evaluate the packages and enter the graph created with Lotus under the paragraph. In this paragraph, you will need to indicate the software you decided was the best, its price, and what equipment will run the software. Later, this paragraph will be added to the report to the head of the company. Print and submit the paragraph and the graph to your instructor for evaluation.

Part 7 - Choosing Spreadsheet Packages

1. Reread the assignment sheet for your consultation project and determine the company's needs for a spreadsheet software package.

2. After looking through the literature provided by your instructor, create a spreadsheet with Lotus 1-2-3 showing the following features of three or four spreadsheet software packages (This list is a sample and is not complete. Feel free to add to it.)

   1. Function Keys
   2. Formatting Features within the spreadsheet
   3. Replication
   4. Printing Capabilities
   5. Built-in formulas
   6. Size--columns and rows

   You will need to choose three or four different spreadsheet packages with these characteristics to compare on the Lotus 1-2-3. After choosing these packages, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

Does not have the feature = 0
Poor quality = 1
Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each charac teristic. Then you will evaluate these numbers to determine which spreadsheet package will be best for the company. Then create a graph to represent these numbers.

3. Print the spreadsheet and submit it to your instructor.

4. Using DisplayWrite 4, prepare a paragraph which describes the process you used to evaluate the packages and enter the graph created with Lotus under the paragraph. In this paragraph, you will need to indicate the software you decided was the best, its price, and what equipment will run the software. Print and sumbit the paragraph and the graph to your instructor for evaluation.

5. Later you will include this paragraph and graph in the report to the head of the company.

Part 8 - Choosing a Data Base

1. Reread the assignment sheet for your consultation project and determine the company's needs for a data base software package.

2. After looking through the literature provided by your instructor, create a spreadsheet with Lotus 1-2-3 showing the following features of three or four data base software packages.(This list is a sample and is not complete. Feel free to add to it.)

   1. Function Keys
   2. Formatting Features within the data base
   3. Printing Capabilities
   4. Easy editing and appending
   5. Size--holds a large number of files

   You will need to choose three or four different data base packages with these characteristics to compare on the Lotus 1-2-3. After choosing these packages, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

   Does not have the feature = 0
   Poor quality = 1

Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which data base package will be best for the company. Then create a graph to represent these numbers.

3. Print the spreadsheet and submit it to your instructor.

4. Prepare a paragraph which describes the process you used to evaluate the packages using DisplayWrite 4 and enter the graph created with Lotus under the paragraph. In this paragraph, you will need to indicate the software you decided was the best, its price, and what equipment will run the software. Print the paragraph and the graph and submit them to the instructor for evaluation.

5. Later you will include this paragraph and graph in the report to the head of the company.

Part 9 - Choosing Integrated Software for the Managers' Workstations

1. Reread the assignment sheet for your consultation project and determine the company's needs for a integrated software for workstations.

2. After looking through the literature provided by your instructor, create a spreadsheet with Lotus 1-2-3 showing the following features of three or four integrated software packages. (This list is a sample and is not complete. Feel free to add to it.)

   1. Function Keys for easy movement from one package to another
   2. Word processing, Data Base, and Spreadsheet capabilities
   3. Printing Capabilities
   4. Easy editing
   5. Calendaring capabilities
   6. Calculator capabilities

   You will need to choose three or four different integrated packages with these characteristics to compare on the Lotus 1-2-3. After choosing these packages, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

Does not have the feature = 0
Poor quality = 1
Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which data base package will be best for the company. Then create a graph to represent these numbers.

3. Print the spreadsheet and submit it to your instructor.

4. Prepare a paragraph which describes the process you used to evaluate the packages using DisplayWrite 4 and enter the graph created with Lotus under the paragraph. In this paragraph, you will need to indicate the software you decided was the best, its price, and what equipment will run the software. Print and submit the paragraph and the graph to your instructor for evaluation.

5. Later you will include this paragraph and graph in the report to the head of the company.

Part 10 - Choosing a Network System

1. Reread the assignment sheet for your consultation project and determine the company's needs for a network system.

2. After looking through the literature provided by your instructor, create a spreadsheet with Lotus 1 2 3 showing the following features of three or four network systems that will meet the needs of your company. (This list is a sample and is not complete. Feel free to add to it.):

   1. Transmission speed
   2. Security levels--file login, password, directory rights
   3. Number of drives the network will require
   4. Gateway to mainframe
   5. Has electronic mail
   6. Network configurations--star, ring, bus
   7. Type of collision function--token pass or collision passing
   8. Sufficient documentation for netware
   9. Type of cables--twisted pair, coaxial, or fiber optics
   10. Maximum number of stations served

   You will need to choose three or four network systems with the above characteristics to compare on the Lotus 1-2-3. After choosing these packages, you will need to read the literature provided by your instructor to evaluate each

one. Then you will assign values to the characteristics listed above according to the following scale:

Does not have the feature = 0
Poor quality = 1
Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which network system will be best for the company. Then create a graph to represent these numbers.

3. Print the spreadsheet and submit it to your instructor.

4. Prepare a paragraph which describes the process you used to evaluate the systems using DisplayWrite 4 and enter the graph created with Lotus under the paragraph. In this paragraph, you will need to indicate the computer system you decided was the best, its price, and what accessories will be needed. Print and submit the paragraph and the graph to you instructor.

5. Later you will include this paragraph and graph in the report to the head of the company.

Part 11 - Choosing Equipment to Run the Software and Netware Chosen

1. Review you choices of software to determine the best equipment to run all of the packages you have chosen. Remember, you must buy equipment that will run the software you have chosen. If you choose one computer for your secretaries and another computer for your executives, you will need to either do two spreadsheets or give explanations for each computer system chosen.

2. After looking through the literature provided by your instructor, create a spreadsheet with Lotus 1-2-3 showing the following features of three or four computers that will run the software you have chosen (This list is a sample and is not complete. Feel free to add to it.):

   1. DOS compatible with software chosen
   2. Sufficient K of memory (at least 256K)
   3. Printing compatible with most printers
   4. Programmable function keys
   5. Built-in modem adaptability
   6. Ergonomically correct screen and keyboard
   7. Upgraded for more memory
   8. Sufficient documentation for operating the computer

9. CP/M Compatibility
10. Upgraded with a hard disk
11. Vendor support in training and maintenance

You will need to choose three or four computer systems with these characteristics to compare on the Lotus 1-2-3. After choosing these packages, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

Does not have the feature = 0
Poor quality = 1
Fair quality = 2
Good quality = 3
Excellent quality = 4

After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which computer system will be best for the company. Then create a graph to represent these numbers.

3. Print the spreadsheet and submit it to your instructor.

4. Prepare a paragraph which describes the process you used to evaluate the systems using DisplayWrite 4 and enter the graph created with Lotus under the paragraph. In this paragraph, you will need to indicate the computer system you decided was the best, why it is the best for the company, its price, and what accessories will be needed. Print and submit the paragraph and the graph to your instructor.

5. Later you will include this paragraph and graph in the report to the head of the company.

Part 12 - Printers

Decide what kind of printers you will need in order to produce the documents need by your company. Your choice of printers may vary from secretary to executive. However, you do need to consider the needs of each work group. You will need to consider the following:

1. If you have networked, you will need to consider buying a fast letter quality printer for each department.

2. If you have not networked, you will need to buy more printers to be placed with each computer or shared between several computers.

3. You will need to consider letter quality, graphics, and colored ink when choosing a computer for each area.

4. Create a spreadsheet on letter-quality, dot matrix, ink jet, and laser printers. In this spreadsheet, you will not show any values for each characteristic. You will show which characteristics are possessed by the different kinds of printers by putting a "yes" or "no" in the column (example--600 words per minute).

   The characteristic of the printers are as follows:

   1. Speed
   2. Bidirectional printing
   3. Quality of Print
   4. Carriage Length
   5. Color of Print
   6. Graphics Capabilities
   7. Compatibility with computers

5. Compose a paragraph comparing all of the types of printers giving their general characteristics. This paragraph will serve as a preface to your paragraph explaining which printers you have chosen for your company. After the paragraph, place a print out or a graph of the spreadsheet.

6. In your report for this part, you need to write a paragraph for each group (secretaries, executives, salesmen, etc.) of personnel for whom you are buying. In this paragraph, you will need to tell the best printer (dot matrix, letter quality, laser or ink jet) for the work done by this group and the brand of the printer you have chosen for this group. Also, include all of the accessories necessary for the printers--tractor feed, sheet feed, paper, printer stands, etc.

7. Submit both paragraphs and a printout of the spreadsheet to your instructor.

8. Later you will add these paragraphs and the spreadsheet to your final report to the head of your company.

Part 13 - Media Storage

Determine the best storage media for your company.

1. Determine if your company will need paper files or if it will use magnetic media.

2. Determine if your company will use micrographics for current files and old files. You will need to investigate the following types of micrographics:

   1. microfiche
   2. microfilm
   3. aperture cards

3. After looking through the literature provided by your instructor, create a spreadsheet with Lotus 1 2 3 showing the following features of two or three micrographic processes that will fit the needs of your company (This list is a sample and is not complete. Feel free to add to it.):

   1. Number of documents on each sheet or film
   2. Speed of retrieving information
   3. Amount of time to convert from paper to film
   4. Ease of day-to-day use

   You will need to choose two or three micrographic systems with the above characteristics to compare on Lotus 1-2-3. After choosing these systems, you will need to read the literature provided by your instructor to evaluate each one. Then you will assign values to the characteristics listed above according to the following scale:

   Does not have the feature = 0
   Poor quality = 1
   Fair quality = 2
   Good quality = 3
   Excellent quality = 4

   After you have created the spreadsheet, you will have the computer add together the values assigned for each characteristic. Then you will evaluate these numbers to determine which micrographic system will be best for the company. Then create a graph to represent these numbers.

3. Print the spreadsheet and submit it to your instructor.

4. Prepare a paragraph which describes the process you used to evaluate the systems using DisplayWrite 4 and enter the graph created with Lotus under the paragraph. In this paragraph, you will need to indicate the micrographic system you decided was the best, its price, and what accessories will be needed. Submit the paragraph and the graph to your instructor.

5. Later you will include this paragraph and graph in the report to the head of the company.

Part 14--Choosing OCR Equipment

1. Reread the assignment sheet to determine if your company will benefit from OCR equipment.

2. Read the literature on OCR equipment provided by your instructor and choose the best equipment for your company.

3. Write a paragraph describing the OCR equipment you have chosen. You will need to tell the special qualities of

the equipment and how these qualities will benefit your company. Also, you will need to tell where the equipment will be located in the company and who will use it. Make sure your choice of OCR equipment will be compatible with your computer system.

4. Print the paragraph and submit it to the instructor for evaluation.

5. Later this paragraph will go into your final report to the head of the company.

Part 15--Determining Teleconferencing Needs

1. From the literature provided by your instructor, choose a teleconferencing system for your company. You may choose from video conferencing, audio conferencing, audiographics, or a combination of these.

2. Write a paragraph describing the teleconferencing you have chosen. Describe how it will benefit the company. Give the name of the system and the cost. Print and submit the paragraph to your instructor for evaluation.

3. Later this paragraph will go into your final report to the head of the company.

Part 16--Evaluating the Telephone System

1. Choose a telephone system that will fit the needs of the company by looking at the brochures supplied by your instructor.

2. Write a paragraph describing the telephone system. Be sure to include the special features of the system and how much it costs. You may use pictures to help describe the system. Print and submit the paragraph to your instructor for evaluation.

3. Later this paragraph will go into your final report to the head of the company.

Part 17--Choosing Office Furniture and Office Layout

1. Choose desks, tables, and chairs for both secretaries and executives.

2. Choose room dividers for the departments in the company.

3. Choose accessories as needed--printer stands, sheet feeders, foot rest, copy holders, glare shields, task lighting, etc.

4. Draw a layout of the Word Processing Center (if you have one) and other secretarial areas showing where desks, chairs, computers, printers, OCR equipment, facsimili equipment, duplicating equipment are located. On your drawing, be sure to show were overhead lighting is located and where the windows are located in relation to the computers. You may use brochures to show the types of dividers you have chosen as well as the furniture and accessories. This layout should be very detailed. Submit your layout to your instructor for evaluation.

5. Create a tabulation describing the furniture and accessories you have chosen for your company. You will need to include the name of the item, the company making the item, and the cost of the item. Print a copy and submit to your instructor.

6. Compose a paragraph describing the items you have chosen. Since all items will have to be justified, you will need to explain the ergonomical significance of each item and fit each item into the scheme of the whole office. You will also need to choose colors for the walls and floor. Remember to talk about noise control with acoustics and environmental control by temperature control and air circulation. Print and submit this paragraph to your instructor for evaluation.

7. Later this paragraph and layout will be added to the report to the head of your company.

Part 18--Training

1. Determine how the employees of your company will be trained. They will need to be trained for dictation, for computer operation, and for network management.

2. Write a paragraph describing how you plan to train the employees. Remember, your vendor should do some of the training. Print and submit this paragraph to your instructor for evaluation.

3. Later this paragraph will be added to the report to the head of the company.

Final Document

By taking all of these parts, you will need to use GET and put all of these paragraphs into one report. You will need to insert graphs from Lotus 1-2-3 as requested in previous parts. You may use pictures and brochures in the report to help the head of the company understand the equipment, furniture, and accessories you are advising him to purchase.

You will want to reread your report checking for correct content, correct word usage and spelling, correct punctuation, and correct formatting for a business report. Remember to use transition words to pull your paragraphs together to create a united report that flows easily from one paragraph to another. Making this a united report will take a lot of revising. Be sure to take your time and do a good job.

You will need to compose a final paragraph that sums up your recommendations and the total cost of these recommendations.

Print your entire report placing all the graphs where they should be and using brochures as needed. You will need to print a cover sheet for the report.